DOCUMENT RESUME

ED 145 860 95 IR 005 343

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TITLE Functional Specifications for the OCLC Interlibrary Loan Subsystem.
INSTITUTION Ohio Coll. Library Center, Columbus.
PUB DATE 25 Jul 77
NOTE 95p.; For related documents, see IR 005 342-344 ; Best copy available

EDRS PRICE MF-$0.83 HC-$4.67 Plus Postage.
DESCRIPTORS Information Systems; *Interlibrary Loans; Libraries; *Library Automation; *Library Networks; On Line Systems; *Specifications
IDENTIFIERS *Ohio College Library Center

ABSTRACT

This report covers functional specifications for the OCLC Interlibrary Loan (ILL) Subsystem, designed to permit participating libraries to increase the availability of library resources to patrons by enabling these libraries to form, transmit, and fulfill loan requests more rapidly and effectively. It will provide rapid access to a large on-line union catalog containing bibliographic data and location listings. Specifications described are definition of on-line files, authorization levels, definition of on-line ILL record--including a chart specifying fields, lengths, input and instruction; searching the file, user workflow at the terminal, summary of user commands, and system messages. (Author/KP)

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# FUNCTIONAL SPECIFICATIONS FOR THE OCLC INTERLIBRARY LOAN SUBSYSTEM

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IR005343

Submitted by: Phyllis V. Bova
1977 July 25

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FUNCTIONAL SPECIFICATIONS

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## SUBSYSTEM OBJECTIVES

The objectives of the Ohio College Library Center's Interlibrary Loan Communication Subsystem are:

1) speed the communication of loan requests

2) reduce the time required to verify the bibliographic description of loan items

3) reduce costs incurred in interlibrary lending

4) provide libraries with on-line control of interlibrary loan records

5) provide "automatic referral" system to reduce delays caused by unfilled requests

## SCOPE

The purpose of OCLC's Interlibrary Loan Subsystem is to permit participating libraries to increase the availability of library resources to patrons by enabling these libraries to formulate, transmit and fulfill loan requests more rapidly and efficiently than can be done by traditional means. The Interlibrary Loan (ILL) Subsystem will provide participating libraries with rapid access to a large on-line union catalog containing not only bibliographic data, but location listings which identify libraries that hold any particular bibliographic item. The ILL Subsystem will hasten the fulfillment of loan requests by reducing the request transmission time, and the time for verification of bibliographic data and call numbers. ILL will provide improved record keeping, reduce overall ILL costs and permit libraries to share resources more effectively.

The OCLC ILL Subsystem will, in its initial implementation, function as follows:

When a librarian receives a patron request for resources which are not available in the local library, he may initiate an interlibrary loan transaction. The terminal operator first logs on to the ILL Subsystem. The operator can then request display of a

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summary message screen which lists loan requests, loan responses, loan renewals and loan recalls pending for the local library. The operator can take immediate action on any of these messages or defer such action and initiate the loan request.

To initiate a loan request, the operator first searches OCLC's On-Line Union Catalog to locate the catalog record which represents the desired item; the librarian can determine which institutions hold the items by inspection of the list of location symbols displayed at the end of the bibliographic record. Once the record is located and the libraries which hold the item have been identified, an ILL Workform is requested. Bibliographic data is automatically transferred to the workform from the catalog record. The operator initiating the request fills in only the appropriate fields and issues a command for the ILL Subsystem to transmit the request to the first of a list of up to five potential lending libraries.

A potential lending institution receives notification of the loan request when its operator logs on to the ILL Subsystem (the same procedure as described above) and requests to see pending loan requests. If the potential lending institution can supply the desired item, the operator fills in certain appropriate fields in the ILL record, commands the system to notify the borrowing library of request fulfillment and initiates procedures for the item to be sent to the borrowing library. When the borrowing library returns the item, the record is once again retrieved and updated. Once the item has been returned to the lending institution, the record is updated a final time to indicate completion of the transaction.

The OCLC ILL Subsystem also has provisions for handling negative and non-responses to loan requests, initiating requests for materials not represented in the On-Line Union Catalog, and sending requests to institutions whose holdings are not represented with the on-line catalog record. Appropriate ILL Transaction records are maintained by the subsystem and the transmission of messages between borrowing and lending institutions is supported.

ENHANCEMENTS

Proposed enhancements to improve the overall capabilities of

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the ILL Subsystem are:

1) automatic referral feature

2) ILL activity reports

3) automated overdue notice facility

In addition, when the Center develops Institution - Specific Files, the ILL Subsystem will automatically supply the name and address of the borrowing and the lending library in the ILL record.

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DEFINITION OF ON-LINE FILES

A. OCLC On-Line Union Catalog

The OCLC On-line Catalog contains over 3 million bibliographic records and grows at the rate of 15,000 records per week. Users of the OCLC/ILL subsystem have access to the on-line catalog via the following search keys:

1) OCLC control number
2) Library of Congress Card Number
3) International Standard Serials Number
4) International Standard Book Number
5) CODEN
6) Title
7) Author/title
8) Personal or Corporate name

While logged on to the ILL Subsystem, users may search the On-line Catalog, but cannot add bibliographic records to the catalog. Bibliographic records can be used as a basis to create on-line ILL records.

B. ILL On-Line Transaction File

The ILL On-Line Transaction file stores ILL records of each participating library. These records provide a library with control of its borrowing and lending transactions and permit on-line maintenance of ILL requests. Libraries may retrieve only the ILL records for loan transactions in which they are the borrowing or lending library. ILL records remain accessible on-line until the borrowing library cancels the loan request or until the lending library acknowledges return of the loan item. In the case of a photocopy, the ILL records remains on-line until the borrowing library indicates receipt of the photocopy.

Users of the OCLC/ILL Subsystem have access to the ILL on-line transaction file via the following search keys:

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1) ILL control number
2) Title
3) Author/title
4) Patron name * or
5) Patron ID *
6) Call number **
7) Borrowing library symbol
8) Lending library symbol

C. Message Waiting File

The Message Waiting File functions like an on-line mailbox in that it stores messages concerning the status of ILL transactions for each participating library. The physical file is stored within the OCLC computer. ILL participants may retrieve messages from the file for their own library only.

A terminal operator can display the message waiting file screen at any time by entering the following command:

mf DISPLAY REC'D SEND

The Message Waiting File screen display contains entries for the following types of messages:

1) ILL Requests
2) ILL Responses
3) ILL Renewals
4) ILL Recalls

The ILL request category informs participants of the number of incoming ILL requests for the library. The ILL response category contains notices of responses to the library ILL requests. The ILL renewals category contains messages related to incoming requests for renewals and responses to the library's own renewal requests. The ILL recall category contains incoming requests for loan recalls.

* Restricted to borrowing library
** Restricted to lending library

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| TO | PROJECT CODE | LEVEL |
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Each Message Waiting File category has a line number. The number that follows the line number indicates how many messages of that type are pending. (See Figure 1 ).

If a terminal operator enters the command to display the Message Waiting File screen, and if no messages are pending the system responds:

There are no messages in your MESSAGE WAITING file.

To retrieve pending messages, the operator enters the appropriate line number and depresses the DISPLAY REC'D and SEND keys. The system responds by displaying a single record if there is only one record in that file for that category, or a list of truncated entries if there are multiple records for that category.

Truncated entries for ILL requests contain the ILL control number and request date (See Figure 2 ). Truncated entries for ILL responses, renewals, and recalls contain the ILL control number and status of loan. (See Figures 3,4,5).

All truncated entries are arranged in numerical sequence by the control number.

Each entry on the truncated screen has a line number. To retrieve a specific record, the operator enters the appropriate line number and depresses the DISPLAY REC'D and SEND keys. ,

| Category of ILL Message | Length of Time in Message Waiting File |
|---|---|
| 1) ILL Requests | Incoming requests remain until the potential lender responds with a "yes", "no", "request later date", or until four days have passed. (Saturdays will be counted as a working day, Sunday and holidays observed by OCLC will not). |

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| Category of ILL Message | Length of Time in Message Waiting File |
|---|---|
| 1) ILL Responses | "Yes" responses to ILL requests remain until the borrowing library acknowledges receipt of the loan item (RecDate entered).<br><br>"Unfilled" responses remain until the borrowing library cancels the ILL request, modifies the 'LENDER' element and transmits the request to new potential lending libraries, or modifies the 'NeedBefore' date and re-transmits the request to the same libraries.<br><br>Responses with a "RETRY" status remain until the borrowing library cancels the ILL request, modifies the 'LENDER' element and transmits the request to new potential lending libraries or until the 'RETRY' date is reached. When the 'RETRY' date arrives, the system automatically transmits the ILL request to the lending library that entered the 'RETRY' date. |
| 3) ILL Renewals | Incoming ILL renewal requests remain until the lending library enters date in the 'NewDueDate' element and REPLACES the record.<br><br>Responses to ILL renewal requests remain until the borrowing library indicates that the loan item has been returned (RETURNED DATE entered). |
| 4) ILL Recalls | ILL recalls remain in the borrowing library's Message Waiting File until they return the item (RETURNED DATE entered). |

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DISPLAY DEFINITION

| TO | PROJECT CODE | ID |
|---|---|---|
| R&D/ILL File | J000 | J105011 |
| FROM | DATE | PAGE |
| Phyllis V. Bova | 77026/rev. 770606 | |
| SUBJECT Response to Command to View Message Waiting File Screen. (mf command) | REF DS: MWFDIS | |

Figure 1

```
The following messages are in your Message Waiting file: ¶
¶
> 1 10 ILL Requests
> 2  5 ILL Responses
> 3  5 ILL Renewals
> 4  2 ILL Recalls
```

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DISPLAY DEFINITION

| TO | PROJECT CODE | ID |
|---|---|---|
| R&D/ILL File | JØØØ | J1Ø2Ø11 |
| **FROM** | **DATE** | **PAGE** |
| Phyllis V. Bova | 77Ø112/rev. 77Ø6Ø6 | 1 of 1 |
| **SUBJECT** | **REF** | |
| Message Waiting File Truncated Screen | DS: Search Component, ILL | |

Figure 2

ILL Requests: ¶
¶

| | ILL# | REQUEST DATE ¶ |
|---|---|---|
| ¶ | | |
| > 1 | 456 | 770203 ¶ |
| > 2 | 5678 | 770302 ¶ |
| > 3 | 5969 | 770312 ¶ |
| > 4 | 8654 | 770330 ¶ |
| > 5 | 19374 | 770402 ¶ |
| > 6 | 19456 | 770410 ¶ |
| > 7 | 21345 | 770415 ¶ |
| > 8 | 25678 | 770421 ¶ |
| > 9 | 25787 | 770424 ¶ |
| >10 | 28932 | 770512 ¶ |

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| 12 | 770608 | |

DISPLAY DEFINITION

| TO | PROJECT CODE | ID |
|---|---|---|
| R&D/ILL File | JØØØ | JIØ2Ø11 |
| FROM | DATE | PAGE |
| Phyllis V. Bova | 77Ø112/rev. 77Ø6Ø6 | 1 of 1 |
| SUBJECT | REF | |
| Message Waiting File Truncated Screen | DS: Search Component, ILL | |

Figure 3

ILL Responses: ¶
¶

| | ILL# | STATUS ¶ |
|---|---|---|
| ¶ | | |
| > 1 | 23456 | SHIPPED ¶ |
| > 2 | 35678 | RETRY 77Ø2Ø3 ¶ |
| > 3 | 75969 | UNFILLED ¶ |
| > 4 | 98654 | EXPIRED ¶ |
| > 5 | 109374 | SHIPPED ¶ |

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DISPLAY DEFINITION

| TO | PROJECT CODE | ID |
|---|---|---|
| R&D/ILL File | JØØØ | J1Ø2Ø11 |
| **FROM** | **DATE** | **PAGE** |
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| **SUBJECT** | **REF** | |
| Message Waiting File Truncated Screen | DS: Searcher Component, ILL | |

Figure 4

ILL Renewals:

¶

| | ILL# | STATUS ¶ |
|---|---|---|
| ¶ | | |
| > 1 | 432 | RENEWAL OK ¶ |
| > 2 | 795 | RENEWAL NOT OK ¶ |
| > 3 | 1002 | RENEWAL REQUEST ¶ |
| > 4 | 2315 | RENEWAL OK ¶ |
| > 5 | 10034 | RENEWAL OK ¶ |

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DISPLAY DEFINITION

| TO | PROJECT CODE | ID |
|---|---|---|
| R&D/ILL File | JØØØ | J1Ø2Ø11 |
| FROM | DATE | PAGE |
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| SUBJECT | REF | |
| Message Waiting File Truncated Screen | DS: Searcher Component, ILL | |

Figure 5

```
ILL Recalls: ¶
¶
          ILL#    STATUS ¶
¶
> 1         960   RECALL ¶
> 2        1246   RECALL ¶
```

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| TO | PROJECT CODE | LEVEL |
|---|---|---|
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LOG-IN

The computer response to a log-in of the ILL Subsystem is shown in Figure 6.

AUTHORIZATION LEVELS

Only "Full" level has been defined for the OCLC/ILL Subsystem.

The capabilities of Full level are:

a) retrieve ILL records belonging to operator's library; i.e., the library is either the borrower or the lender in the loan transaction.

b) alter data elements to maintain ILL records for operator's library

c) dispatch loan requests, responses, renewals and recalls

d) cancel loan requests

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DISPLAY DEFINITION

| TO | PROJECT CODE | ID |
|---|---|---|
| R&D File | JØØØ | JØØØØØØ |
| **FROM** | **DATE** | **PAGE** |
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| **SUBJECT** | **REF** | |
| Computer response to log-in | ILL User Manual | |

Figure 6

[General system greeting] ¶
You will be using the INTERLIBRARY LOAN subsystem. ¶

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DISPLAY DEFINITION

| TO | PROJECT CODE | ID |
|---|---|---|
| R&D/ILL File | J000 | J108011 |
| **FROM** | **DATE** | **PAGE** |
| Phyllis V. Bova | 4 March 1977 | 1 of 1 |
| **SUBJECT** | **REF** | |
| ILL Workform Display | SD: ILLWFR | |

Figure 7

```
Can you supply?  >Yes  >No  >Future date:          ¶
 ILL:            Borrower:        ReqDate:        Status:
 OCLC:           >NeedBefore:     RecDate:        RenewalReq:
 Lender:                          DueDate:        NewDueDate:      ¶
>1  CALLNO:                ¶
>2  AUTHOR:                ¶
>3  TITLE:                 ¶
>4  EDITION:               ¶
>5  IMPRINT:               ¶
>6  ARTICLE:               ¶
>7  VOL:           NO:                DATE:           PAGES:       ¶
>8  VERIFIED:              ¶
>9  PATRON:                ¶
>10 SHIP TO:               ¶
>11 BILL TO:               ¶
>12 SHIP VIA:                         MAXCOST:                     ¶
>13 BORROWING NOTES:       ¶
>14 LENDING CHARGES:                  DATE SHIPPED:   SHIP INSURANCE:  ¶
>15 LENDING RESTRICTIONS:      ¶
>16 LENDING NOTES:            ¶
>17 RETURN TO:                ¶
>18 RETURN VIA:               ¶
>19 RETURNED VIA:                     RETURNED DATE:  INSURANCE:   ¶
```

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Director LSD

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The one line query at the top of the work form, "Can you supply? >Yes >No >Future date" will be displayed with the ILL record when retrieved by the lending library if the ILL record has a status of PENDING. When the ILL record has a status other than PENDING, the query will not display. The borrowing library will never see the one-line query.

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| TO R&D/ILL File | PROJECT CODE 5000 | LEVEL |
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DEFINITION OF ON-LINE ILL RECORD

In the column labeled "Input Specifications" on the following pages, OCLC has defined some data entry requirements for the user.

| INPUT SPECIFICATION | EXPLANATION |
|---|---|
| 1) System-supplied | supplied by the system/cannot be manually changed by the operator |
| 2) System-required | must be input by operator in order to effectively make use of the system |
| 3) Mandatory if applicable | mandatory to supply correct date in field if it applies to the particular loan transaction, e.g. loan renewal |
| 4) Optional | optional to supply data in field |

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FROM: Phyllis V. Bova
SUBJECT: ILL Record Format
PROJECT CODE: JØØØ
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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| ILL | Interlibrary loan Control Number | Fixed | System-supplied | A sequential number assigned automatically by the System. This number may not be altered by the user. |
| Borrower | Borrowing Library | Fixed | System-supplied | A three character OCLC Symbol of the borrowing library. This element is supplied by the system when the borrowing library requests a workform display. |
| ReqDate | Request Date | Fixed | System-supplied | The system supplies this date at the time the borrowing library requests a workform display. The format of the date is yymmdd, where"yy" represents the last two digits of the year, "mm" represents the numeric identification of the month, and "dd" represents the number of the day. For example, 23 March 1977 would appear as 770323. |
| Status | Current status | Fixed | System-supplied | The system supplies one of 11 possible status indicators in this field. Each status indicator is triggered by the input of data within specific fields in the ILL record.<br><br>1) EXPIRED<br>Loan was not satisfied before the "NeedBefore" date arrived. |

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FILE:

| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| Status | (continued) | | | 2) PENDING<br><br>Loan request is pending in the message waiting file of a potential lending library. The system sets the status of PENDING when the borrowing library initially transmits a loan request or when the system automatically refers the loan request to the next potential lending library after a negative response. Loan requests remain pending in a potential lending library's message file for 4 days. If a potential lending library does not respond to the request in 4 days the system automatically refers the request to the next potential lending library listed in the LENDER element of the fixed field.<br><br>3) RECALL<br><br>Lending library has "recalled" the loan item by retrieving the ILL record and entering the recall command at the Home position, 'rec' UPDATE SEND<br><br>4) RENEWAL NOT OK<br><br>Lending library has responded negatively to the loan renewal request. The system sets the status to RENEWAL NOT OK when |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| Status | (continued) | | | the lending library enters a "no" in the element New DueDate in the fixed field.<br><br>5) RENEWAL OK<br><br>Lending library has granted a loan renewal to borrowing library. The system sets the status to RENEWAL OK when the lending library enters a renewal date in the element NewDueDate in the fixed field.<br><br>6) RENEWAL REQ<br><br>Borrowing library is requesting a renewal of the loan item. The system sets the status to RENEWAL REQ when the borrowing library enters a desired renewal date or the word "any" in the element RenewalReq of the fixed field.<br><br>7) RETRY (yymmdd)<br><br>Loan has not been filled by any of the potential lending libraries, but at least one lending library entered a date following "Request later" when asked the question if they could supply the item. The ILL Request will remain active and |



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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| Status | (continued) | | | wait for the "Request later date" unless the borrowing library enters a new string of lending library symbols or cancels the ILL request. When the Request later date is reached, the system will dispatch the loan request to the potential lending library which entered the earliest "Future date". If a new string of potential lending library symbols is entered, the system will disregard the "Future date" responses.<br><br>8) RETURNED<br><br>Borrowing library has returned the loan item to the lending library. The system sets the status to RETURNED when the borrowing library enters a date in the element RETURNED DATE of line 19.<br><br>9) SHIPPED<br><br>Loan item has been shipped to the borrowing library. The system sets status to SHIPPED when the lending library enters a date in the DATE SHIPPED element of line 14.<br><br>10) UNFILLED<br><br>No potential lending library could satisfy the loan request, and no "Request later date" was entered |

| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| NeedBefore | (continued) | | | The system adds this number to the request date and displays the result in the yymmdd format when the ILL record is reformatted.<br><br>If the operator leaves this element blank, the system supplies a default date of 30 days from the date of the request. |
| RecDate | Date of Receipt | Fixed 6 characters | Borrowing Library (System-required) | Date on which the Borrowing library received the loan item. The RecDate must be input and follows the yymmdd format:<br><br>770402 |
| RenewalReq | Renewal Request | Fixed 6 characters | Borrowing Library (Mandatory if applicable) | Request for renewal of a loan entered by the Borrowing library. To request renewal, the Borrowing library inputs a desired renewal date in the yymmdd format, or a number of days, or the word "any". "Any" indicates that any loan extension period is acceptable. |
| Lender | Lending Library | Fixed 30 characters | Borrowing Library (System-required) | OCLC institution symbols for potential lending libraries. The data in Lender is supplied by the Borrowing library and may contain a maximum of five OCLC institution symbols. For example: |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| Status | (continued) | | | by any of the libraries. The borrowing library should enter new potential lending library symbols in the Lender element of the fixed field. The Borrowing library also has the option to cancel the request at this time<br><br>11) WILL SUPPLY<br><br>Lending library has responded yes to the question displayed at the top of the screen. "Can you supply? >Yes >No > Future date:" |
| OCLC | OCLC Control Number | Fixed | System-supplied | This element is system-supplied from the bibliographic record used to create the loan record. If no bibliographic record exists in the On-Line Union Catalog for the desired loan item, the element is blank. |
| NeedBefore | Date before which the patron requires the loan material | Fixed<br>6 characters | Borrowing Library (Optional) | The Borrowing library enters either a date in the yymmdd format, (770612) or enters a specific number of days preceded by a plus sign (+15), or leaves the element blank.<br><br>For example, if the loan request must be satisfied within 3 weeks in order to be useful to the patron, the operator inputs:<br><br>NeedBefore: +21 |

| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| Lender | (continued) | | | Lender: OSU,YUS,RRR,KUK,ITD<br><br>The borrowing library may enter the OCLC institution symbols at the home position along with the workform command while the bibliographic record for the loan item is displayed:<br><br>wf/OUS,YUS,RRR,KUK,ITD DISPLAY/SEND<br><br>The system will automatically place those symbols in the Lender element on the workform and place an asterisk (*) in front of the first OCLC symbol in the LENDER field. An asterisk before an OCLC symbol indicates which library has the ILL request in their Message Waiting File. The system controls the movement of the asterisk, moving down the string of potential lenders in sequence. As an alternative the operator may just request a workform and fill in the institution symbols in the Lender element. |
| DueDate | DueDate of the loan | Fixed 6 characters | Lending Library (System-required) | Date input by the lending library that indicates the date by which the loan item should be returned to the library. If the supplied material need not be returned, e.g., when a photocopy is sent, the library inputs "none" in element DueDate. |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| DueDate | (continued)/ | | | The lending library enters a due date for the loan using either the yymmdd format, or a number of days preceded by a plus sign:<br><br>DueDate: +40 |
| NewDueDate | Renewal Date | Fixed 6 characters | Lending Library (Mandatory if applicable) | Renewal date entered by the lending library. The lending library enters a response to a renewal request by entering a new due date in the yymmdd format, or a number of days preceded by a plus sign or the word "no". |
| CALLNO | Call Number | V | Lending Library (Optional) | The local call number of the lending library is input without subfield codes but may contain blanks to facilitate recognition. The system will index the first eight characters (minus blanks and punctuation) of the call number. Examples of call numbers are:<br><br>CALL NO: PZ1092.2.C5T41966<br><br>or<br><br>PZ 1Ø92.2.C5 T4 1966<br><br>When local data records are available on-line, the system will automatically supply the call number of the lending library in this field. |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| AUTHOR | Author | V | Borrowing Library (Mandatory if applicable) | If a bibliographic record is used to create the ILL request, the system displays the entire 1xx field from the bibliographic record.<br><br>The borrowing library may edit the system supplied author name.<br><br>If the desired bibliographic record is not found in the On-Line Catalog the borrowing library must input the AUTHOR element according to standard cataloging practice. For example:<br><br>AUTHOR: Tyron, Thomas E.<br><br>AUTHOR: United Nations General Assembly<br>22nd session, 1967-68<br>Delegation from the U.S. |
| TITLE | Title of Loan Item<br>or<br>Periodical Title | V | Borrowing Library (system-required) | The system extracts subfields 'a' and 'b' from the 245 field if a bibliographic record is used to create the loan request. The borrowing library may edit the system-supplied title.<br><br>If a bibliographic record is not used to create the loan request, the borrowing library must input the title. |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| EDITION | Edition | V | Borrowing Library (Mandatory if applicable) | If a bibliographic record is used to create the loan request, the system extracts the 'a' subfield of the 250 field (if present) and displays it in the EDITION field on the loan request.<br><br>The borrowing library may edit this field to describe alternate editions which would also be acceptable:<br><br>EDITION: 6th edition preferred, 5th |
| IMPRINT | Imprint of the Loan Item or of Periodical | V | Borrowing Library (Mandatory if applicable) | The IMPRINT contains the place, publisher and date of the loan item. The system extracts this information from the 260, 261, or 262 field of the bibliographic record, depending on the type of material being requested |
| ARTICLE | Author and Title of Periodical Article | V | Borrowing Library (Mandatory if applicable) | The author's full name and title must be supplied by the borrowing library. A slash separates the author and title portions:<br><br>ARTICLE: Phyllis A. Richmond/ Classification from PRECIS: Some Possibilities |
| VOL | Volume | V | Borrowing Library (Mandatory if applicable) | If a volume designation is required for a set or a serial, the borrowing library enters the designation in VOL. Either Arabic or Roman numerals may be used. |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| NO | Number or Issue | V | Borrowing Library (Mandatory if applicable) | The borrowing library supplies the issue identification of a serial publication. Arabic, Roman numerals, or alphabetic characters may be used. |
| DATE | Date of Serial Publication | V | Borrowing Library (Mandatory if applicable) | The borrowing library enters the date of the serial publication in DATE.<br><br>Full date should be given<br><br>DATE: July-August 1976 |
| PAGES | Pages | V | Borrowing Library (Mandatory if applicable) | The borrowing library inputs inclusive pagination in a serial to be photocopied. |
| VERIFIED | Source of Verification | V | Borrowing Library (System-required) | If a bibliographic record in the On-Line Union Catalog is used to create the loan request, the system automatically displays "OCLC" in the VERIFIED field to indicate the source of bibliographic verification.<br><br>If the bibliographic record is not used to create the loan request, the borrowing library must enter the source of bibliographic verification on the loan request.<br><br>Whenever possible, libraries should use standard source abbreviations and verification procedures outlined in the ALA Interlibrary Loan Procedures Manual. |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| PATRON | Patron Name or Identification Number | V | Borrowing Library (Optional) | The borrowing library may input the name or identification number and status of the patron who needs the loan material.<br><br>If a name is entered, the operator must enter the last name first, followed by a comma and the first name. If middle name or initial is known it follows the first name preceded by a comma. If status is input it should follow the Patron name or ID and should be separated from the name or ID by a slash.<br><br>EXAMPLE:<br><br>Patron: White, James R./student<br>Patron: 103-47-0303/student |
| SHIP TO | Mailing Address of the Borrowing Library | V | Borrowing Library (system-required) | The mailing address should be entered as a text string with each line of the address separated by a slash.<br><br>SHIP TO: ILL Librarian/Library Systems Division/OCLC/ 1125 Kinnear Rd./ Columbus, Ohio 43212 |
| BILL TO | Billing Address of the Borrowing Library | V | Borrowing Library (system-required) | The borrowing library enters the billing address for interlibrary loan charges as a text string, with each line of the address separated by a slash. If the billing address is the same as the mailing address, enter "SAME" in the BILL TO field. |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| SHIP VIA | Method of Shipment Preferred by Borrowing Library | V | Borrowing Library (optional) | The borrowing library enters the preferred method of shipment for receipt of the loan item in the SHIP VIA field.<br><br>The borrowing library may specify any preferred shipping method. Common ones are: 1st class, airmail, library rate, regional delivery serv., UPS, etc.<br><br>If the library leaves the SHIP VIA element blank, the system will supply "library rate" as a default. |
| MAXCOST | Maximum Cost | V | Borrowing Library (optional) | The borrowing library enters the maximum charge that it will pay for the loan. |
| BORROWING NOTES | Borrowing Library Notes | V | Borrowing Library (optional) | The borrowing library uses this field to explain any special instructions or messages which concern the loan request and are not included elsewhere on the loan request form.<br><br>If the call number of a specific potential lender is known because of access to a printed union list, it can be included in this field. |
| LENDING CHARGES | Charges of the Lending Library | V | Lending Library (optional) | The lending library inputs an amount for all charges accessed to the borrowing library for completion of the loan request. The lending library specifies total charges including charges for photocopying. |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| DATE SHIPPED | Date shipped by Lending Library | F 6 characters | Lending Library (optional) | The lending library enters the date the loan item is shipped to the borrowing library. The date is entered in the yymmdd format.<br><br>DATE SHIPPED: 770619 |
| SHIP INSURANCE | Shipping Insurance | V | Lending Library (optional) | The lending library enters the amount which the item is insured for in shipping.<br><br>SHIP INSURANCE: $10.00 |
| LENDING RESTRICTIONS | Restrictions on Loan | V | Lending Library (optional) | The lending library enters any restrictions placed on the use of the loan material |
| LENDING NOTES | Lending Library Notes | F | Lending Library (optional) | The lending library uses this field to record any special instructions or messages which concern the response to the loan request and are not included elsewhere on the loan form. |
| RETURN TO | Address of the Lending Library | V | Lending Library (system-required) | The lending library enters the return address as a text string, separating each line of the address with a slash.<br><br>RETURN TO: ILL Librarian/Library Systems Division/OCLC/ 1125 Kinnear Rd./ Columbus, Ohio 43212 |

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| Field Mnemonic | Field Name | Fixed or Variable Length | Input Specifications | Instructions & Explanations |
|---|---|---|---|---|
| RETURN VIA | Lending Library's Preferred Method of shipment for Return of Loan Item | V | Lending Library (optional) | The lending library uses this field to indicate preferred method of shipment for return of loan item and to indicate any packaging or shipping instruction which the borrowing library should follow when it returns the loan item. |
| RETURNED | Method of Shipment Used to Return Loan Item | V | Borrowing Library (optional) | The borrowing library enters the method of return shipment for the loan item. |
| RETURNED | Date Loan Item Returned to Lender | F 6 characters | Borrowing Library (system-required) | The borrowing library enters the date the loan item is mailed back to the lending library. The date is entered in the yymmdd format.<br><br>RETURNED DATE: 770914 |
| INSURANCE | Insurance on Return of Loan Item | V | Borrowing Library (optional) | The borrowing library enters the amount the loan item is insured for in return shipment. |

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## CHART OF DATA ELEMENTS TRANSFERRED FROM BIBLIOGRAPHIC RECORD TO ILL RECORD

| Field in ILL Record | Field/Subfield Transferred from Bibliographic Record |
|---|---|
| AUTHOR | 1xx field/all subfields |
| TITLE | 245 field/subfield 'a' and 'b' |
| EDITION | 250 field/subfield 'a' |
| IMPRINT | 260 or 261 or 262/all subfields |

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Figure 8

SAMPLE ILL REQUEST

ILL: 13567 Borrower:OCL ReqDate:770720 Status:PENDING
OCLC: 1564906 NeedBefore:770801 RecDate: RenewalReq:
Lender: ksu,*cwr,pit DueDate: NewDueDate:

1 CALLNO:
2 AUTHOR:
3 TITLE: The Construction Specifier for better private & public constructic
4 EDITION:
5 IMPRINT: Washington, D.C., Construction Specifications Institute.
6 ARTICLE: What is New About Building Programming?
7 VOL: NO: DATE: October 1969 PAGES:
8 VERIFIED: OCLC and Architectural Exchange Bibliography
9 PATRON: Little, Thompson/Assoc. Exec. Director
10 SHIP TO: Corporate Library/OCLC/1125 Kinnear Rd./Columbus, OH 43212
11 BILL TO: Same
12 SHIP VIA: MAXCOST: 5.00
13 BORROWING NOTES: Please send photocopy.
14 LENDING CHARGES: DATE SHIPPED: SHIP INSURANCE:
15 LENDING RESTRICTIONS:
16 LENDING NOTES:
17 RETURN TO:
18 RETURN VIA:
19 RETURNED VIA RETURNED DATE: INSURANCE:

(See next page for bibliographic record in On-Line Catalog
that was used as a basis for ILL record)

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Figure 9

BIBLIOGRAPHIC RECORD IN ON-LINE UNION CATALOG
USED TO CREATE ILL RECORD

OCLC: 1564906 Rec stat: n Entrd: 750824 Used: 770625
Type: a Bib lvl: s Govt pub: Lang: eng Source: d S/L et: _
Repr: Enc lvl: L Conf pub: 0 Ctry: dcu Ser tp: p Alphabt:
Indx: _ Mod rec: Phys med: Cont: A Frequn: _ Pub st: c
Desc: _ Cum ind: _ Titl pag: _ ISDS: Regulr: _ Dates: ____-____
1 010
2 040 MUL c MUL
3 022 0010-6925
4 035 0195169 b MULS a Ulp No. 2286000000 a PITT NO. 2157300007
5 090 b
6 049 OCLC
7 245 00 Construction specifier; b for better private and public construction.
8 260 01 Washington, D.C., b Construction Specifications Institute.
9 500 July 1949 called v. 1, no.2.
KSU CWR PIT QPR MUL

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Figure 10

SAMPLE ILL REQUEST

```
ILL:     236    Borrower:OCL        ReqDate:770720    Status:PENDING
OCLC: 185738     NeedBefore:         RecDate:          RenewalReq:
Lender: *oun,fnp                     DueDate:          NewDueDate:
 1   CALLNO:
 2   AUTHOR: Calderon de  la Barca, Frances Erskine (Inglis)
 3   TITLE: Life in Mexico, during a residence of two years in that country
 4   EDITION:
 5   IMPRINT: Mexico, Ediciones Tolteca, 1952
 6   ARTICLE:
 7   VOL:       NO:                 DATE:                PAGES:
 8   VERIFIED: OCLC
 9   PATRON: Smith, Henry/staff
 10  SHIP TO: Corporate Library/OCLC/1125 Kinnear Rd./Columbus, OH 43212
 11  BILL TO: Same
 12  SHIP VIA:                       MAXCOST: 3.00
 13  BORROWING NOTES:
 14  LENDING CHARGES:                DATE SHIPPED:       SHIP INSURANCE:
 15  LENDING RESTRICTIONS:
 16  LENDING NOTES:
 17  RETURN TO:
 18  RETURN VIA:
 19  RETURNED VIA                    RETURNED DATE:      INSURANCE:
```

(See next page for bibliographic record in On-Line Catalog
that was used as a basis for ILL record)

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Figure 11

BIBLIOGRAPHIC RECORD IN ON-LINE UNION CATALOG
USED TO CREATE ILL RECORD

OCLC: 185738 Rec stat: n Entrd: 711221 Used: 760322
Type: a Bib lvl: m Govt pub: _ Lang: eng Source: u Illus:
Repr: Enc lvl: I Conf pub: _ Ctry: ___ Dat tp: _ M/F/B: ___
Indx: _ Mod rec: _ Festschr: _ Cont:
Desc: _ Int lvl: _ Dates: 152,____

```
  1 010
  2 040      c OUN
  3 090     F1213 b .C12 1952
  4 090      b
  5 049     OCLC
  6 100 20  Calderon de la Barca, Frances Erskine (Inglis) d 1804-1882.
  7 245 1   Life in Mexico, b during a residence of two years in that
country, c by Mme. Calderon de la Barca.  Edited, with an introduction, by
Camille Destilleres Comas.
  8 260 0   Mexico, b Ediciones Tolteca, c 1952.
  9 300     xix, 404 p. b plates. c 20 cm.
 10 500     First published in 1843.
 11 651  0  Mexico x Description and travel.
 12 651  0  Mexico x Social life and customs.
OUN FNP
```

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SEARCHING - ILL TRANSACTION FILE

I. General Procedures

A. Enter the search key at the Home position of the terminal screen.

B. After typing the search key, depress the DISPLAY REC'D and SEND keys.

C. The system searches the file for all records that correspond to that search key.

1. Negative response

a. If no record in the file is found to correspond to the search key, the computer response will repeat the search key and the index file searched, for example:

PA: SMIT,WAL, is not in the PATRON NAME INDEX.
Please try a different search key.

b. Verify from this message that the search key was entered correctly and with the proper punctuation and mnemonic prefix.

c. Search the file through alternative search keys.

d. Continue searching until all possible access points to the record have been tried.

2. Single response

a. If a single record in the file corresponds to the search key, the system will respond by displaying the complete record.

b. If the record retrieved is not the desired one, try other access points as described above.

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3. Multiple responses

a. When two or more records respond to a search key, the system will identify briefly all the records retrieved. The system prepares "truncated entries" consisting of the author main entry, title and patron name. For serial items, the author main entry, title, volume, date and patron name display in the truncated entry.

II. Search Key Construction

To retrieve a record from the On-Line Transaction File, a user may enter a search key constructed or derived from one of the following data elements.

1) ILL control number
2) Call number
3) Borrowing library symbol
4) Lending library symbol
5) Title of loan material
6) Author/title of loan material
7) Patron name or
8) Patron identification number

1. Interlibrary loan control number

a) Description: The ILL control number is a sequential number assigned by the OCLC computer System to each record as it enters the On-Line Transaction File. The number displays as the first data element in each ILL record, following the label "ILL:" in the first line.

b) Field indexed: Fixed field element "ILL:"

c) Search key structure: The mnemonic code il: followed by one or more digits.

d) Example:

| ILL number | Search key |
|---|---|
| 24721 | il:24721 |

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2. Call number

a) Description: The call number field, CALLNO: provides the lending library with call number identification and assists in the retrieval of loan material. In the first version of the system, the lending library will have to enter the call number, but later system enhancements will extract the call number from the lending library's local data record and display it automatically in the loan request record.

b) Field indexed: CALLNO:

c) Search key structure: The mnemonic code cn: followed by the first eight alphabetic and/or numeric characters of the call number. Alphabetics may be entered in the upper or lower case. Exclude decimal points, blank spaces, and special characters, i.e., colon.

d) Example:

| Call Number in ILL record | Search key |
|---|---|
| HD 34 .T25 M19 1967 | cn:hd34t25m |
| 800.958 | cn:800958 |
| A/V 4256 | cn:av4256 |

3. Borrowing library symbol

a) Description: The borrowing library search key enables users to access the ILL On-Line Transaction File for materials which have been borrowed from them by a particular library.

b) Fields Indexed: Lender element and Borrower element of fixed field.

c) Search key structure: The mnemonic code bl: followed by the three character symbol of an OCLC participating library.

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d) Example:

| Search key | ILL Records Retrieved |
|---|---|
| bl:yab | all items currently borrowed by library yab from you. |

4. Lending library symbol

a) Description: The lending library search key enables users to access the ILL On-Line Transaction File for materials currently on loan to them by a particular library.

The system does not permit the operator to retrieve the ILL record(s) of other participating libraries. When an operator enters an illegal institution symbol -- one which his library has neither lent to nor borrowed from -- the system will reply:

"Request Impossible"

b) Fields Indexed: Lender element and Borrower element of fixed field.

c) Search key structure: The mnemonic code ll: followed by the three character symbol of an OCLC participating library.

d) Example:

| Search key | ILL Records Retrieved |
|---|---|
| ll:xyz | All items currently on loan to your library by library xyz. |

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5. Title

a) Description: The title search permits participants to access the On-Line Transaction File by the title of the loan material. In the case of periodicals, the TITLE field will contain the title of the periodical, NOT the title of the article within the periodical which is being requested. This search key is based on the first four words of field "TITLE" in the ILL record and excludes initial English articles "a", "an", "the".

b) Field indexed: TITLE

c) Search key structure: The mnemonic code ti: followed by the first three letters of the first word, the first two letters of the second and third words and the first character of the fourth word. A title search must also contain three commas to separate the four derived character strings.

ti: 3,2,2,1

If there are not four words, the three commas must still be present.

d) Example:

| Title Field in ILL Record | Search key |
|---|---|
| D.H. Lawrence review | ti: d,la,re, |
| An introduction to the use of computers | ti: int,to,th,u |
| Cybernetics | ti: cyb,,, |

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| Phyllis V. Bova | 60 | |

| TO | PROJECT CODE | LEVEL |
|---|---|---|
| R&D/ILL File | J000 | |
| FROM | DATE | REVIEWED BY |
| Phyllis V. Bova | 19770720 | |
| SUBJECT | REF | PAGE |

6. Author/Title

a) Description: The author/title search permits the user to access ILL records by the author and title of a loan item. This search does not allow retrieval by the author and title of an article within a periodical or other serial.

This search key is based on the first word of the author main entry, e.g., personal author's surname and first word of corporate or conference name, and the first word of the title excluding initial English articles "a", "an", "the".

b) Fields indexed: AUTHOR and TITLE

c) Search key structure: The mnemonic code at: followed by the first three or four letters of the author main entry and the first three or four letters of the first word of the title. A comma separates the name and title portions of the search key.

at: 4,4 at: 3,3

d) Example:

| | Author and title in ILL Record | Search key |
|---|---|---|
| AUTHOR: | Odiorne, George S. | at: odio,mana |
| TITLE: | Management by objectives | |
| AUTHOR: | Cherry, Colin | at: cher,on |
| TITLE: | On human communications | |
| AUTHOR: | American Library Association | at: amer,ala |
| TITLE: | ALA Handbook on Organization | |

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FUNCTIONAL SPECIFICATIONS

| TO R&D/ILL File | PROJECT CODE JØØØ | LEVEL |
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7. Patron name

a) Description: The patron name search permits interlibrary loan staff of the borrowing library to retrieve all ILL records requested by or on loan to a given library patron. The patron name search is based on the first four characters of the surname, and the first one, two, or three characters of forename. The first character of the middle name is optional. Two commas separate the three derived character strings.

i. If there is any doubt as to whether the name has been entered in the ILL record with a middle name or initial, leave the third segment blank. The system will then retrieve all records with and without a middle name or initial.

ii. For all names beginning with a prefix M', Mc or Mac which is followed by an upper case letter, the system will internally convert the prefix to M. Thus to search a name beginning with one of these prefixes, begin with m and then skip to the character following the prefix.

iii. When indexing the surname segment of a personal name (word or words preceding the first comma) the system ignores blank spaces. Thus compound surnames beginning with articles are searched as if they were single words.

b) Field indexed: PATRON

c) Search key structure: The mnemonic code pa: followed by the first four letters of the patron's last name and one, two or three characters of the first name. The first character of the middle name is optional. Two commas separate the three derived character strings.

| | | | |
|---|---|---|---|
| pa: | 4,3,1 | 4,2,1 | 4,1,1 |
| | 4,3, | 4,2, | 4,1, |

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|---|---|---|
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FUNCTIONAL SPECIFICATIONS

| TO R&D/ILL File | PROJECT CODE JØØØ | LEVEL |
|---|---|---|
| FROM Phyllis W. Bova | DATE 1977Ø72Ø | REVIEWED BY |
| SUBJECT | REF | PAGE |

d) Example:

| Patron name in ILL Record | Search key |
|---|---|
| Jones, John K. | pa: jone,joh,k |
| De La Mare, Walter | pa: dela,wal, |
| Del Mango, Milton C. | pa: delm,mil,c |
| MacMaster, Robert | pa: mmas,rob, |
| McGuire, Edna | pa: magui,edn, |
| Macdonald, John | pa: macd,joh, |
| Armstrong-Jones Antony | pa: arms,ant, |

8. Patron identification number

a) Description: The patron ID search allows interlibrary loan staff of the borrowing library to retrieve by ID number all ILL records requested by or on loan to a given library patron.

Fixed indexed: PATRON

Search key structure: The mnemonic code pn: followed by eight characters (alpha and/or numeric) of the patron ID. If a social security number is used as a patron ID, the full social security number including hyphens is entered.

Examples:

| Patron ID in ILL Record | Search key |
|---|---|
| 103-44-2177 | pn: 103-44-2177 |
| cc44467126 | pn: cc444672 |

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|---|---|---|
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FUNCTIONAL SPECIFICATIONS

| R&D/ILL File | PROJECT CODE J000 | LEVEL |
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| OM Phyllis V. Bova | DATE 19770720 | REVIEWED BY |
| BJECT | REF | PAGE |

III. Truncated Entry Display

When multiple records respond to a search key, the arrangement of the truncated entries depend upon the search key employed.

| Search Key that retrieves multiple records | Fields in ILL record by which truncated entries are sorted |
|---|---|
| Call number | AUTHOR, TITLE, PATRON |
| Borrowing library symbol | AUTHOR, TITLE, PATRON |
| Lending library symbol | AUTHOR, TITLE, PATRON |
| Title | TITLE, AUTHOR, PATRON |
| Author/title | AUTHOR, TITLE, PATRON |
| Patron Name or ID | PATRON, AUTHOR, TITLE |

In the case of a serial item, the VOLUME and DATE fields will display in the truncated entry immediately following the TITLE.

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DISPLAY DEFINITION

| TO R&D/ILL File | PROJECT CODE JØØØ | ID J1Ø2Ø11 |
|---|---|---|
| FROM Phyllis V. Bova | DATE 77Ø3Ø9 rev.77Ø6Ø6 | PAGE 1 of 1 |
| SUBJECT Truncated Screen resulting from Author/Title Search on On-Line Transaction File | REF DS: Search Component, ILL | |

Figure 12

> 1 Smith, Cecil L., Fortran IV programming, for engineer and scientists, PATRON: AMØ98732 ¶
> 2 Smith, Francis Hopkinson, The fortunes of Oliver Horn, PATRON: Jacobson, Loretta ¶
> 3 Smith, Francis Hopkinson, Forty minutes late, PATRON: Jay, Gerald T. ¶
> 4 Smith, Harry Bache, The fortune teller; an operetta, PATRON: Washburn, Claire ¶

Approved by:



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|---|---|---|
| Phyllis V. Bova | 77Ø9Ø5 | |

FORM 740330-F12

DISPLAY DEFINITION

| TO | PROJECT CODE | ID |
|---|---|---|
| R&D ILL File | JØØØ | J1Ø2Ø11 |
| FROM | DATE | PAGE |
| Phyllis V. Bova | 77Ø3Ø9/rev. 77Ø6Ø6 | 1 of 1 |
| SUBJECT Truncated Screen Resulting from Title search of On-Line Transaction File | REF | |

Figure 13

```
> 1  The plant alkaloids  Henry, Thomas Anderson,  PATRON: Van Nosterand,
     James ¶
> 2  Plants alive.  PATRON: Killington, Henry ¶
> 3  Plants alive.  V. II  1975  PATRON: 000-01-0000 ¶
> 4  Plastic alphabet.  Open Court Publications  PATRON: Janson, Margaret ¶
```

Approved by:



| ISSUED BY | APPROVED BY | FILE |
|---|---|---|
| Phyllis V. Bova | 770703 | |

DISPLAY DEFINITION

| TO | PROJECT CODE | ID |
|---|---|---|
| R&D/ILL file | J000 | J102011 |
| FROM | DATE | PAGE |
| Phyllis V. Bova | 19770309 | 1 Of 1 |
| SUBJECT | REF | |
| Truncated screen resulting from search of On-line transaction file by patron name | | |

Figure 14

> 1 PATRON: Allen, Walter. Drury, James Westbrook. Changes made by the 1951 Legislature in Kansas library laws ¶
> 2 PATRON: Allen, Walter Ernest. St John, Charles Falding. Deformation of alpha-uranium ¶

Approved by:

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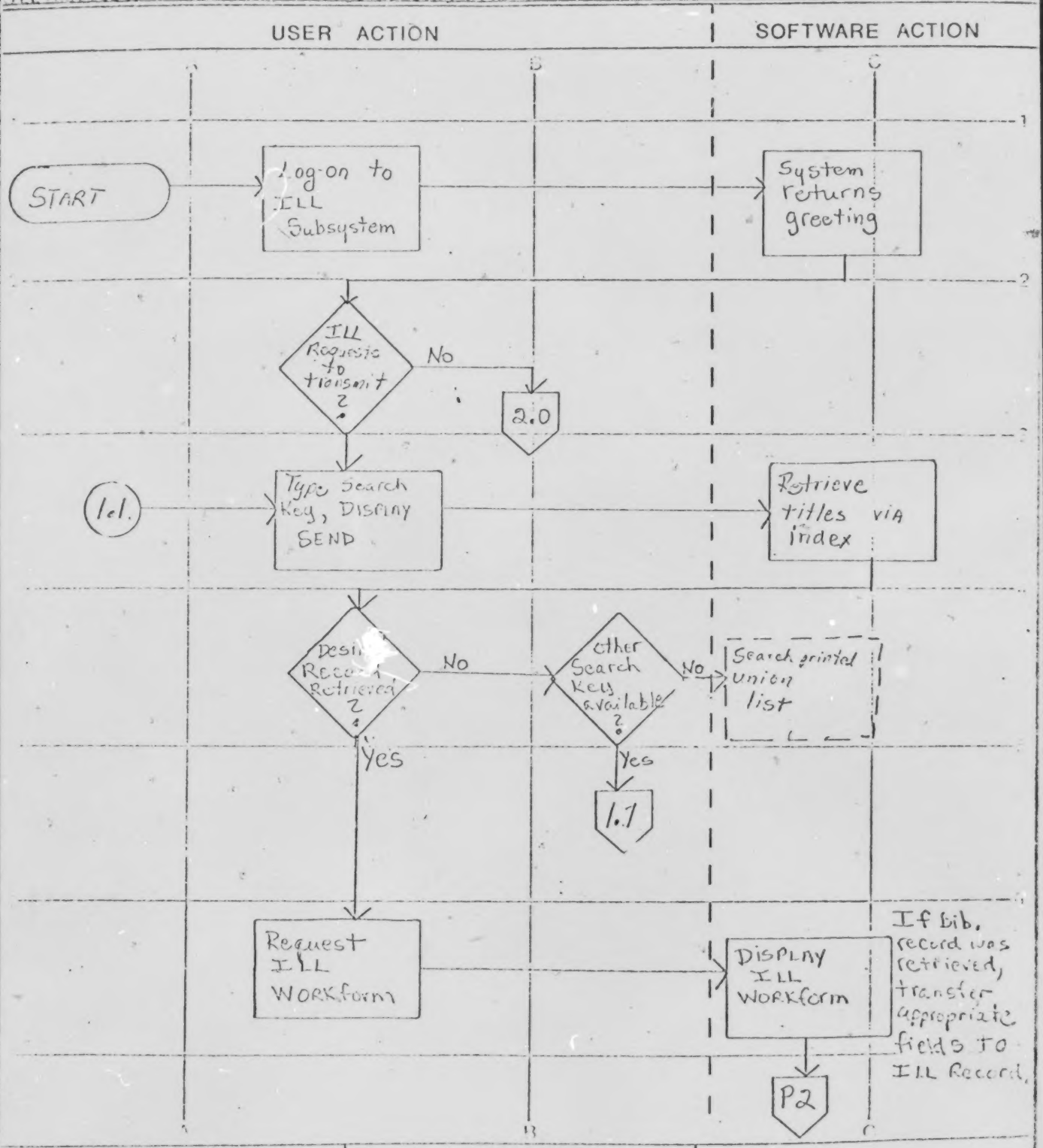
|---|---|---|
| Phyllis V. Bova | [illegible] 770705 | |

FORM 740030-F12

# USER WORKFLOW

| | | |
|---|---|---|
| TO RDD/ILL File | PROJECT CODE | CLASS |
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT Procedure at Terminal for Transmitting ILL Requests & Examining Message Waiting File | REF | PAGE 1 of 10 |

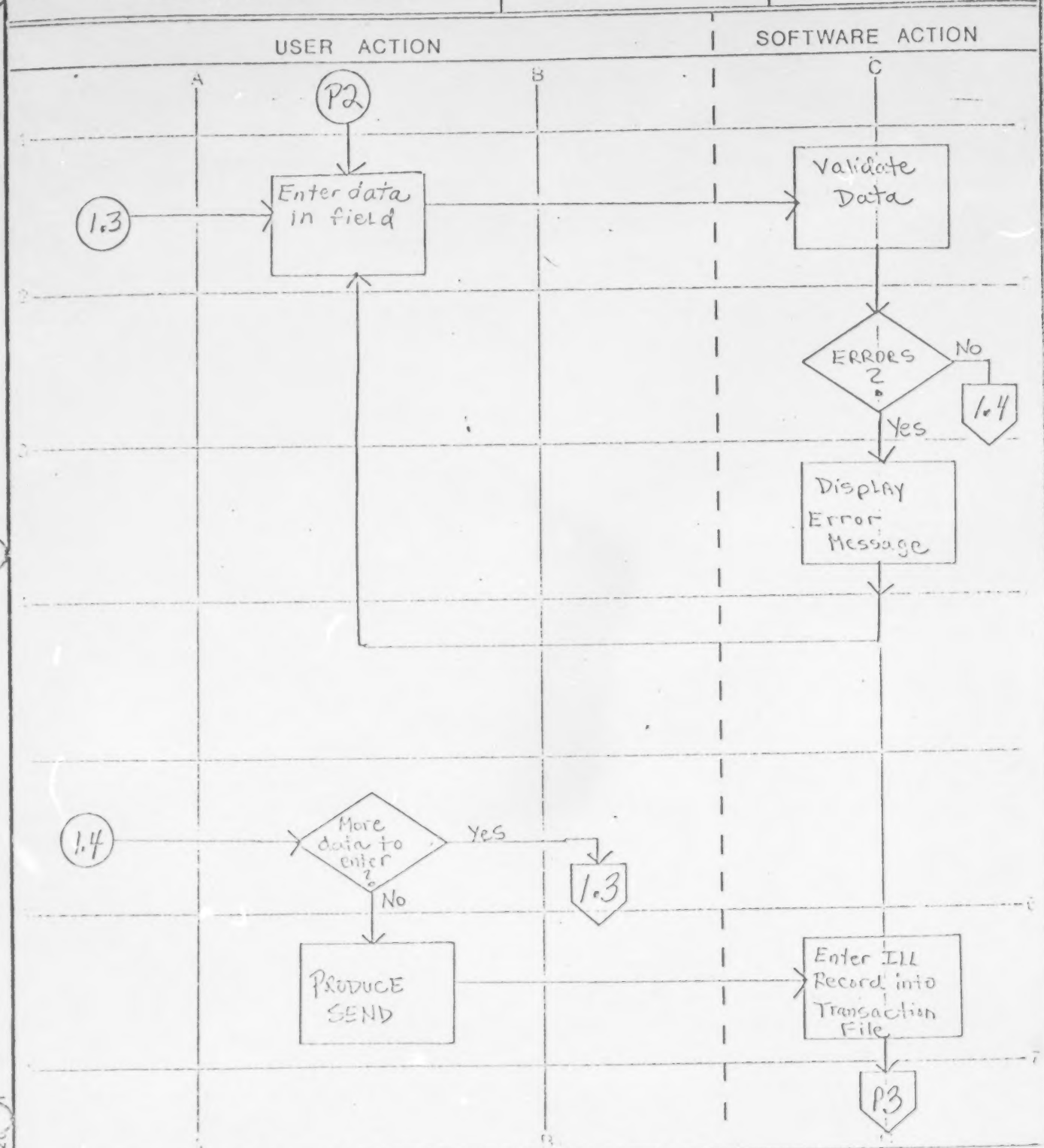



| ISSUED BY | APPROVED BY | FILE |
|---|---|---|
| Phyllis V. Bova | | |



FORM 770225

| TO RDD/ILL File | PROJECT CODE J000 | CLASS |
|---|---|---|
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT ...Transmitting ILL Requests | REF | PAGE 2 of 10 |

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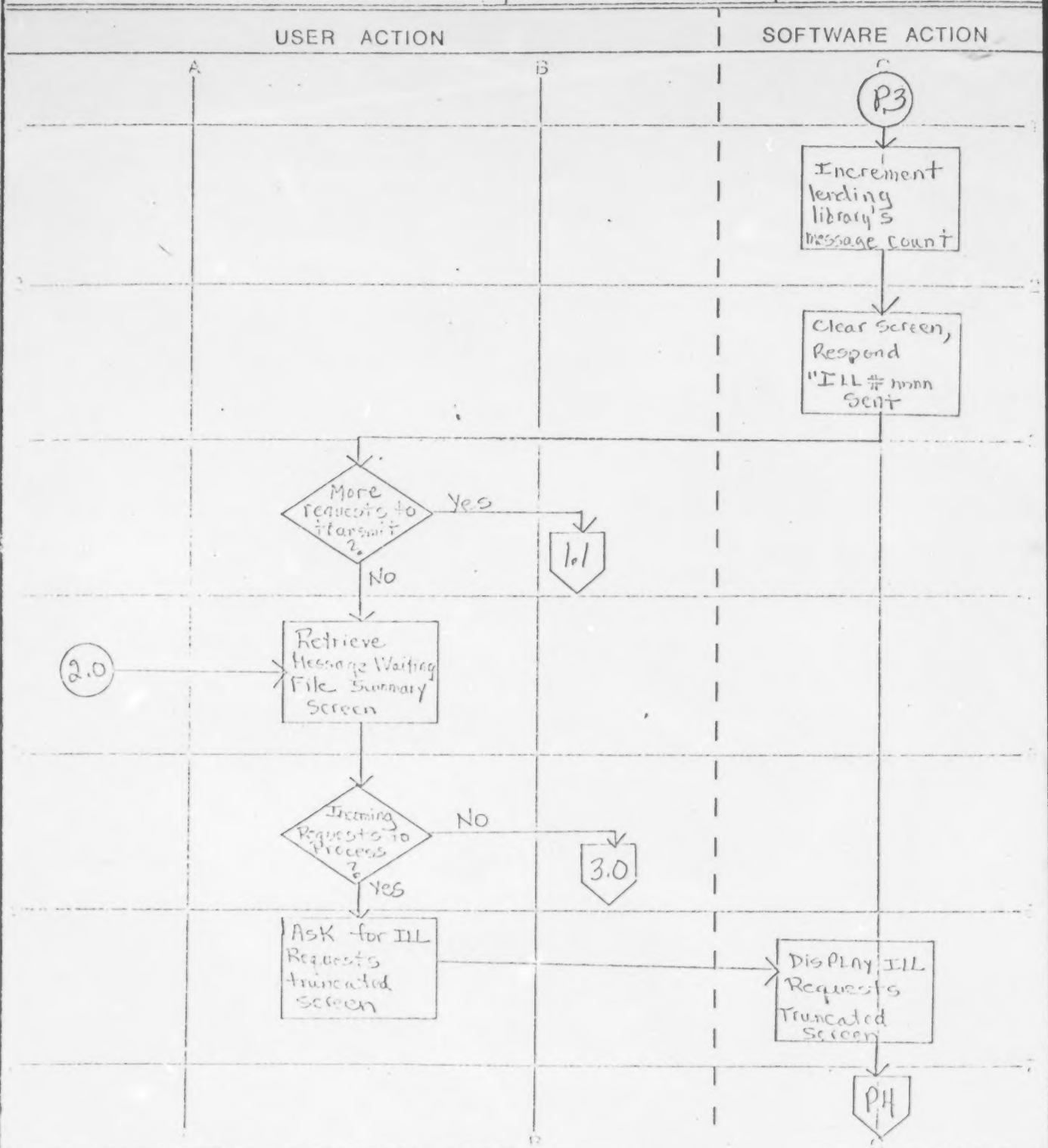
|---|---|---|
| Phyllis V. Bova | 69 | |

FORM 770224

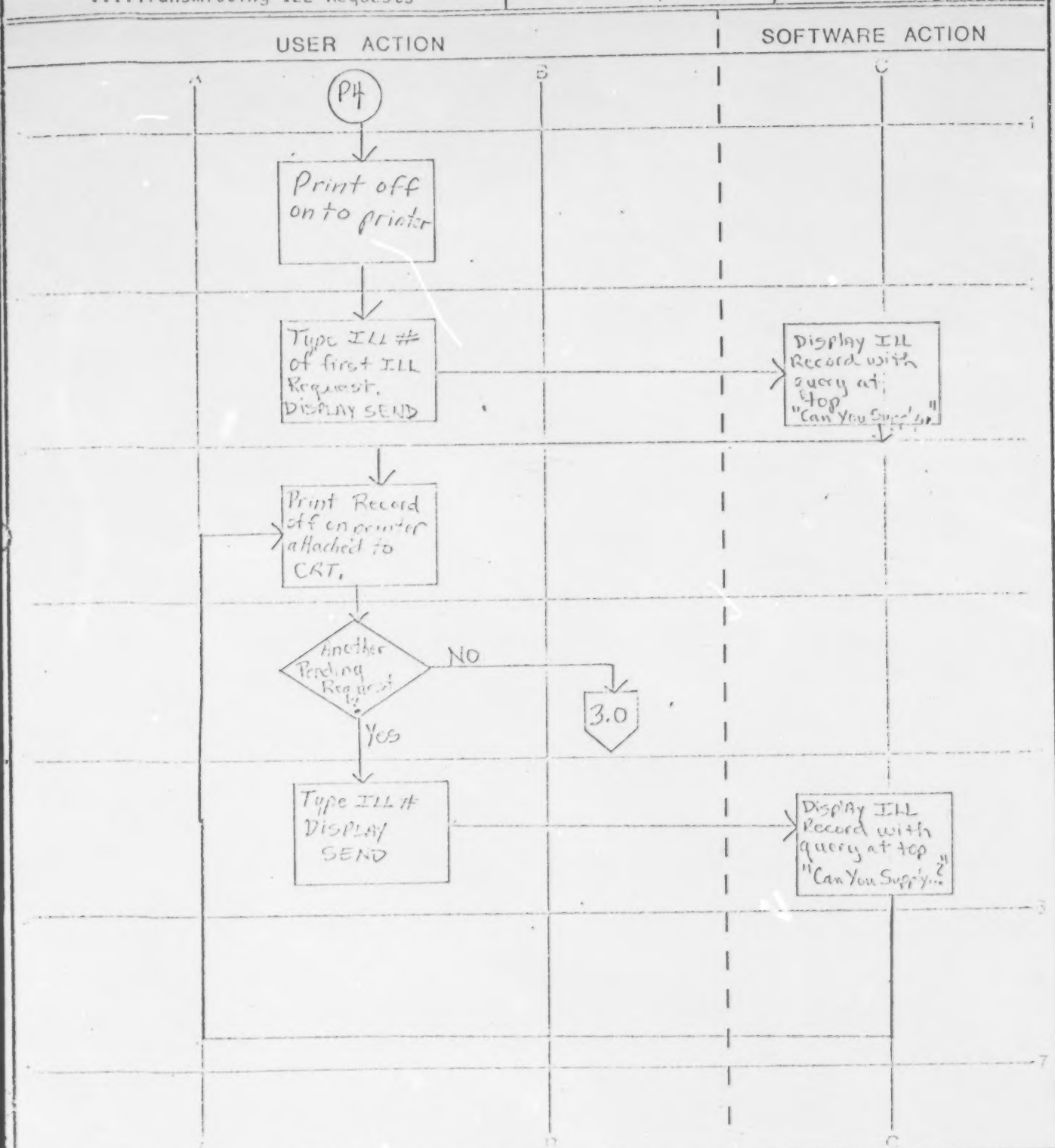
| TO | PROJECT CODE | CLASS |
|---|---|---|
| RDD/ILL File | JØØØ | |
| **FROM** | **DATE** | **LEVEL** |
| Phyllis V. Bova | 1977Ø72Ø | |
| **SUBJECT** | **REF** | **PAGE** |
| ....Transmitting ILL Requests | | 3 of 10 |




| ISSUED BY | APPROVED BY | FILE |
|---|---|---|
| Phyllis V. Bova | 70 | |

# USER WORKFLOW

| | | |
|---|---|---|
| TO: RDD/ILL File | PROJECT CODE: J000 | CLASS: |
| FROM: Phyllis V. Bova | DATE: 19770720 | LEVEL: |
| SUBJECT: ....Transmitting ILL Requests | REF: | PAGE: 4 of 10 |

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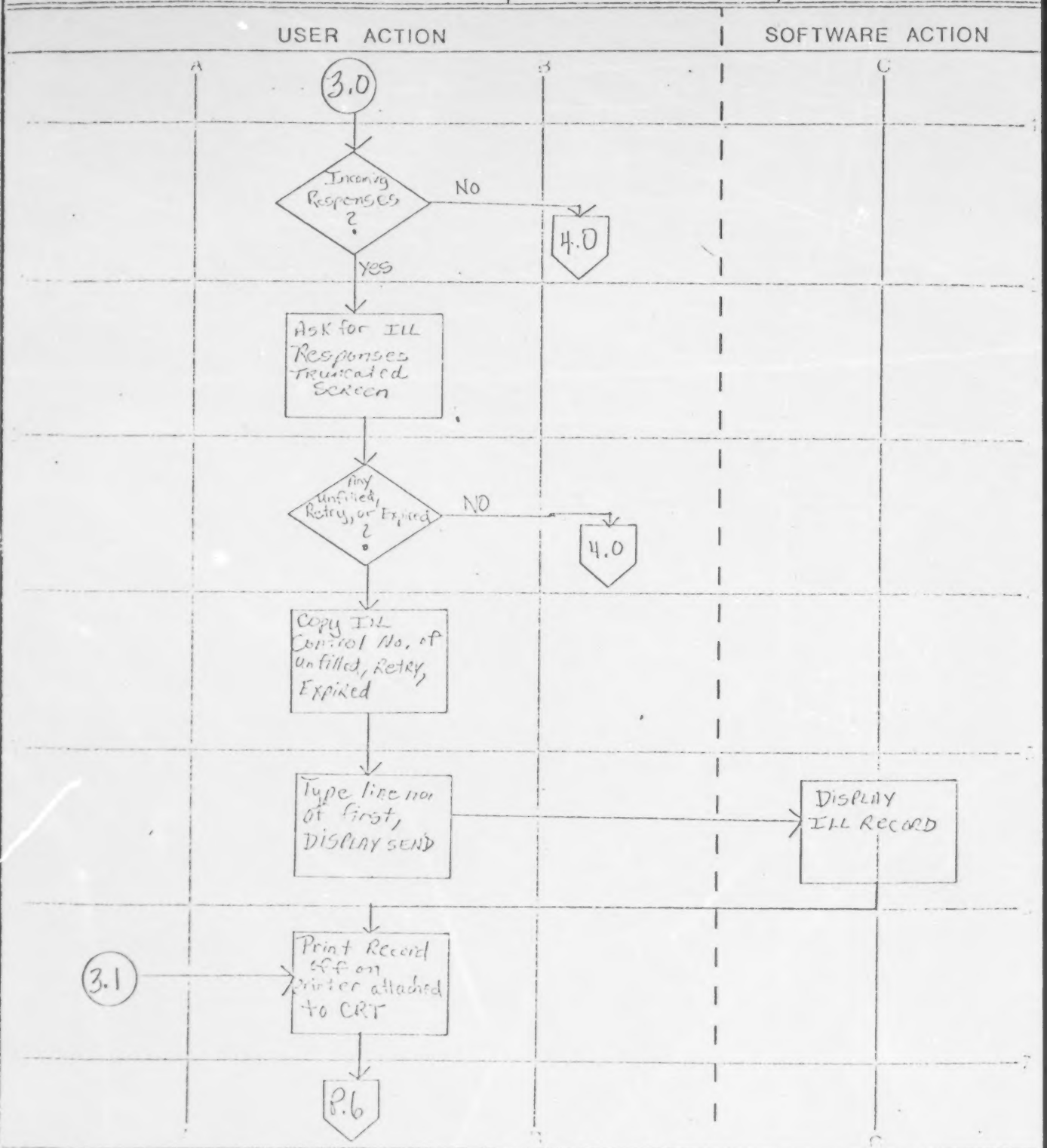
| Phyllis V. Bova | 71 | |

USER WORKFLOW

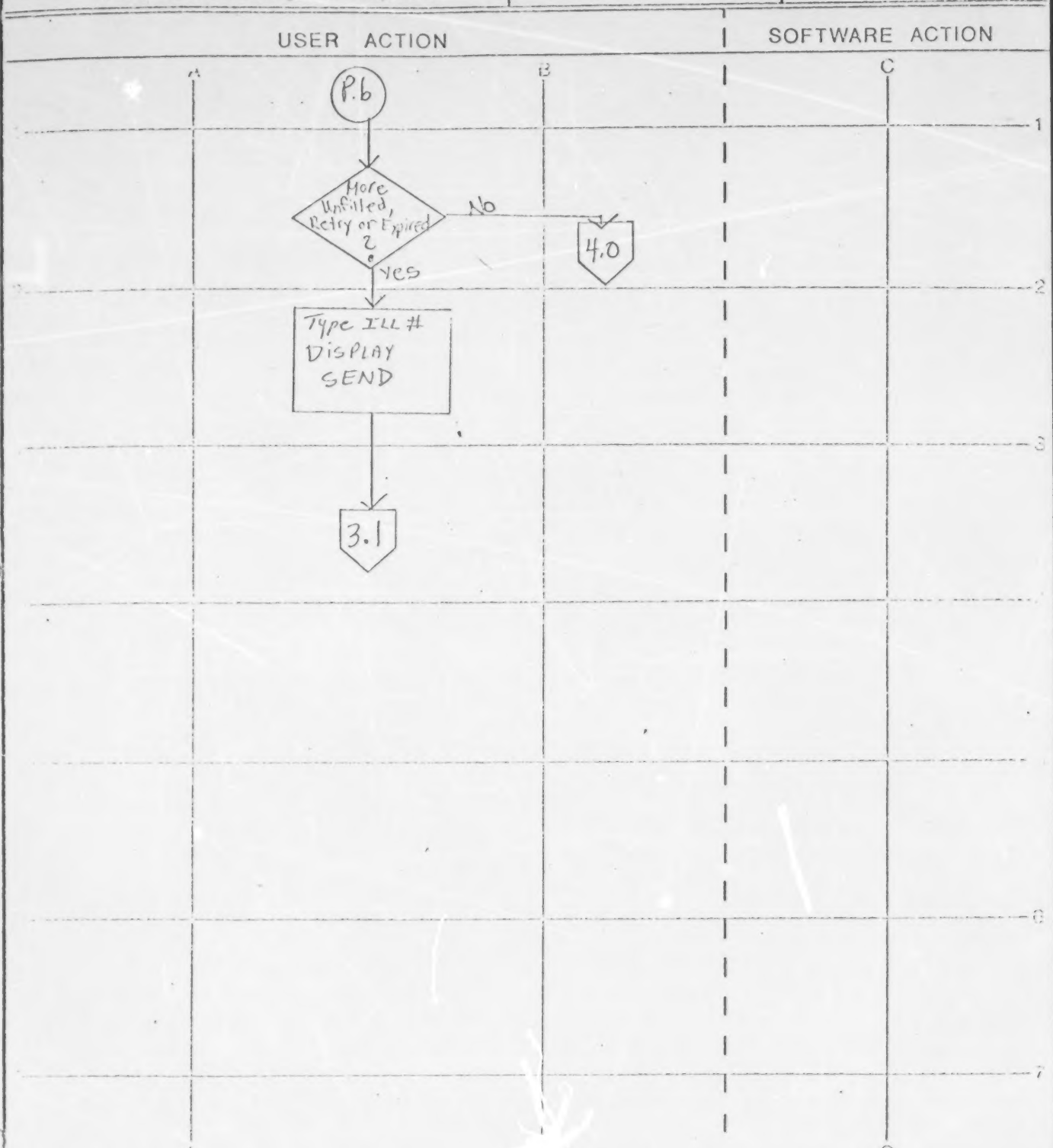
| TO | PROJECT CODE | CLASS |
|---|---|---|
| RDD/ILL File | JØØØ | |
| FROM Phyllis V. Bova | DATE 1977Ø72Ø | LEVEL |
| SUBJECT .... Transmitting ILL Requests | REF | PAGE 5 of 10 |




| ISSUED BY | APPROVED BY | FILE |
|---|---|---|
| Phyllis V. Bova | 72 | |

FORM 77022

| TO | PROJECT CODE | CLASS |
|---|---|---|
| RDD/ILL File | J000 | |
| **FROM** | **DATE** | **LEVEL** |
| Phyllis V. Bova | 19770720 | |
| **SUBJECT** | **REF** | **PAGE** |
| .... Transmitting ILL Requests | | 6 of 10 |

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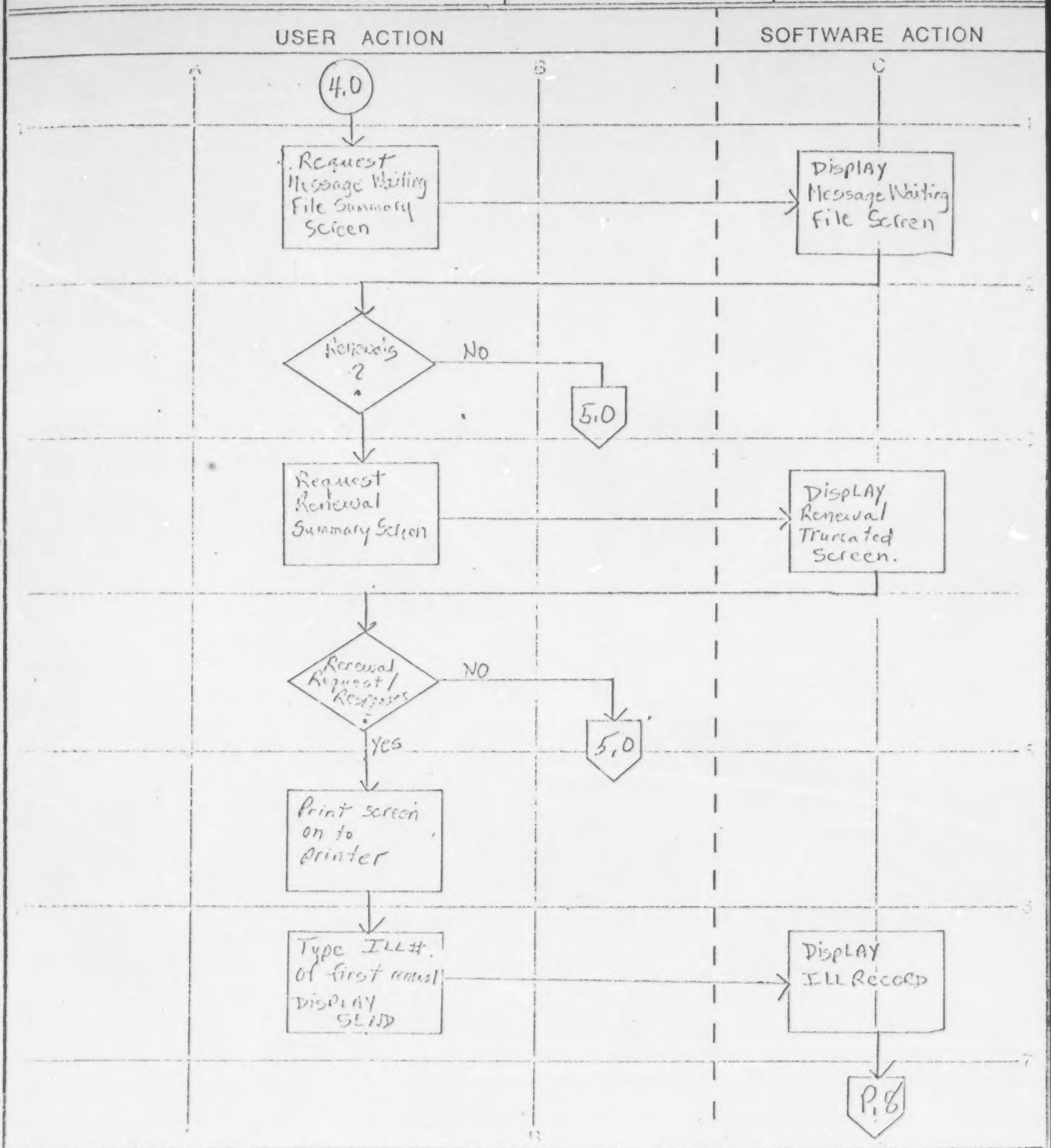
|---|---|---|
| Phyllis V. Bova | 73 | |

FORM 7702

USER WORKFLOW

| TO | PROJECT CODE | CLASS |
|---|---|---|
| RDD/ILL File | J000 | |
| **FROM** Phyllis V. Bova | **DATE** 19770720 | **LEVEL** |
| **SUBJECT** .... Transmitting ILL Requests | **REF** | **PAGE** 7 of 10 |

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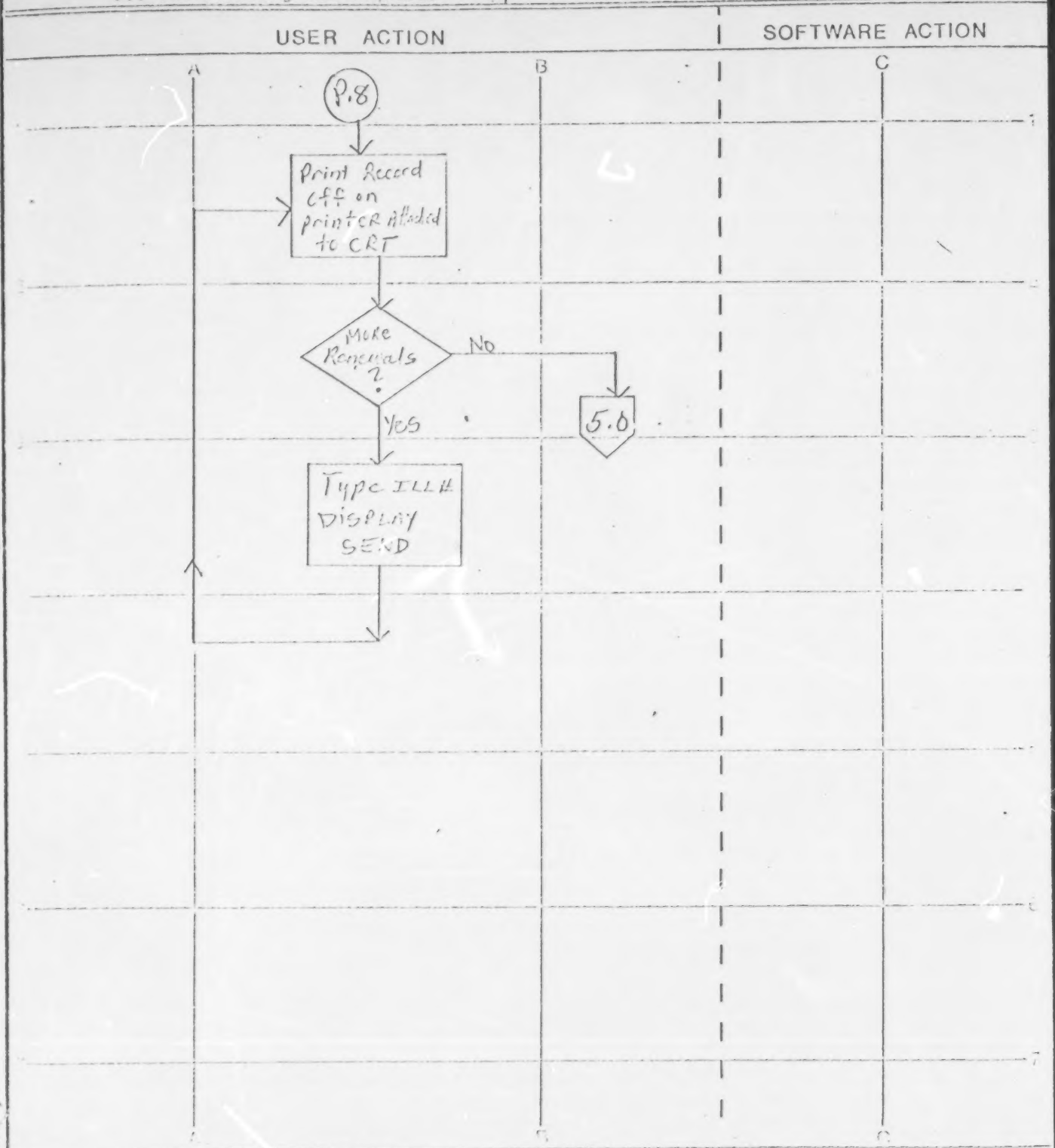
| Phyllis V. Bova | 74 | |

OAM 770226

# USER WORKFLOW

| | | |
|---|---|---|
| TO RDD/ILL File | PROJECT CODE J000 | CLASS |
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT ... Transmitting ILL Requests | REF | PAGE 8 of 10 |

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|---|---|---|
| Phyllis V. Bova | 75 | |

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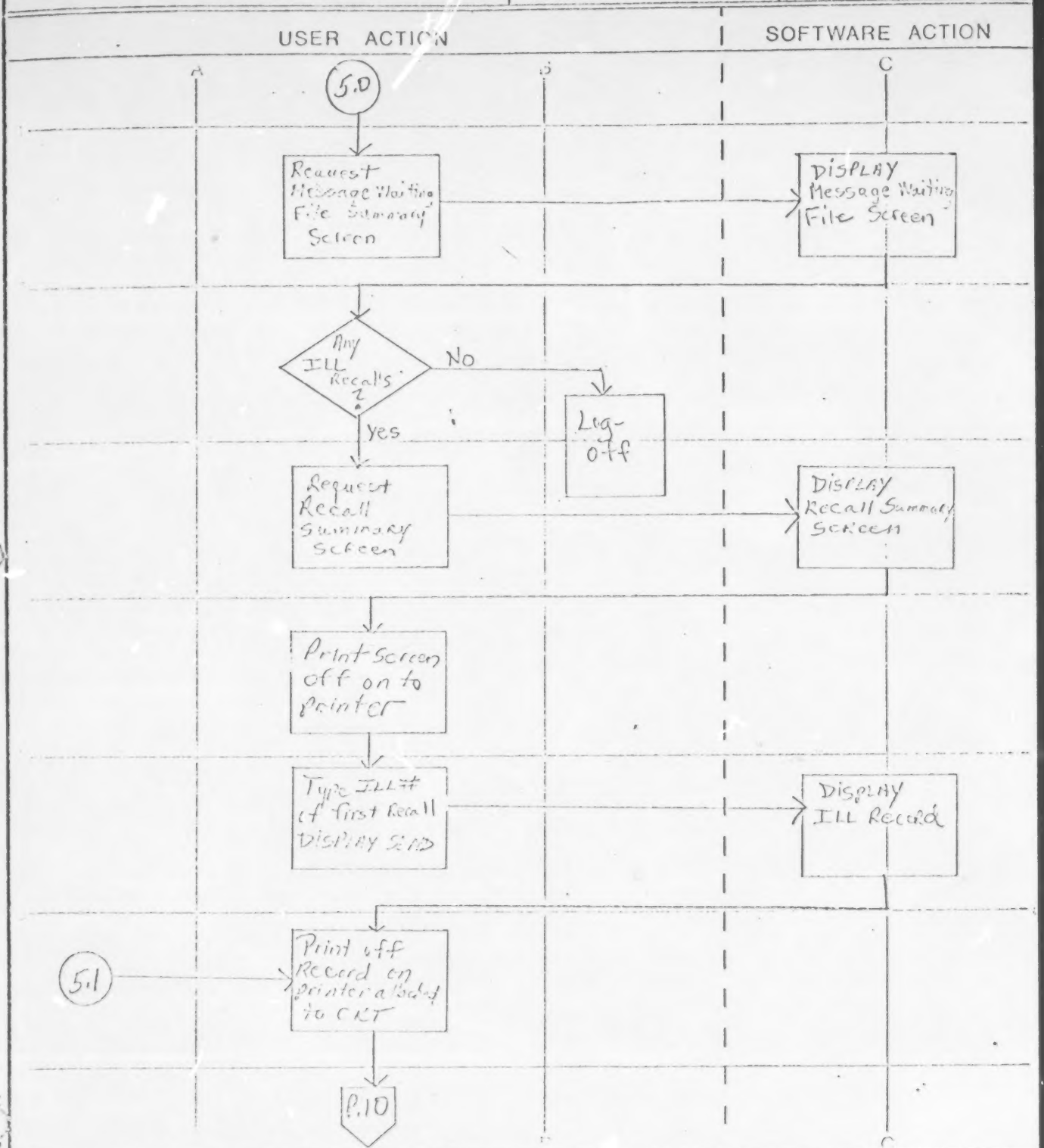
| TO | PROJECT CODE | CLASS |
|---|---|---|
| RDD/ILL FIle | JØØØ | |
| **FROM** Phyllis V. Bova | **DATE** 19770720 | **LEVEL** |
| **SUBJECT** ... Transmitting ILL Requests | **REF** | **PAGE** 9 of 10 |

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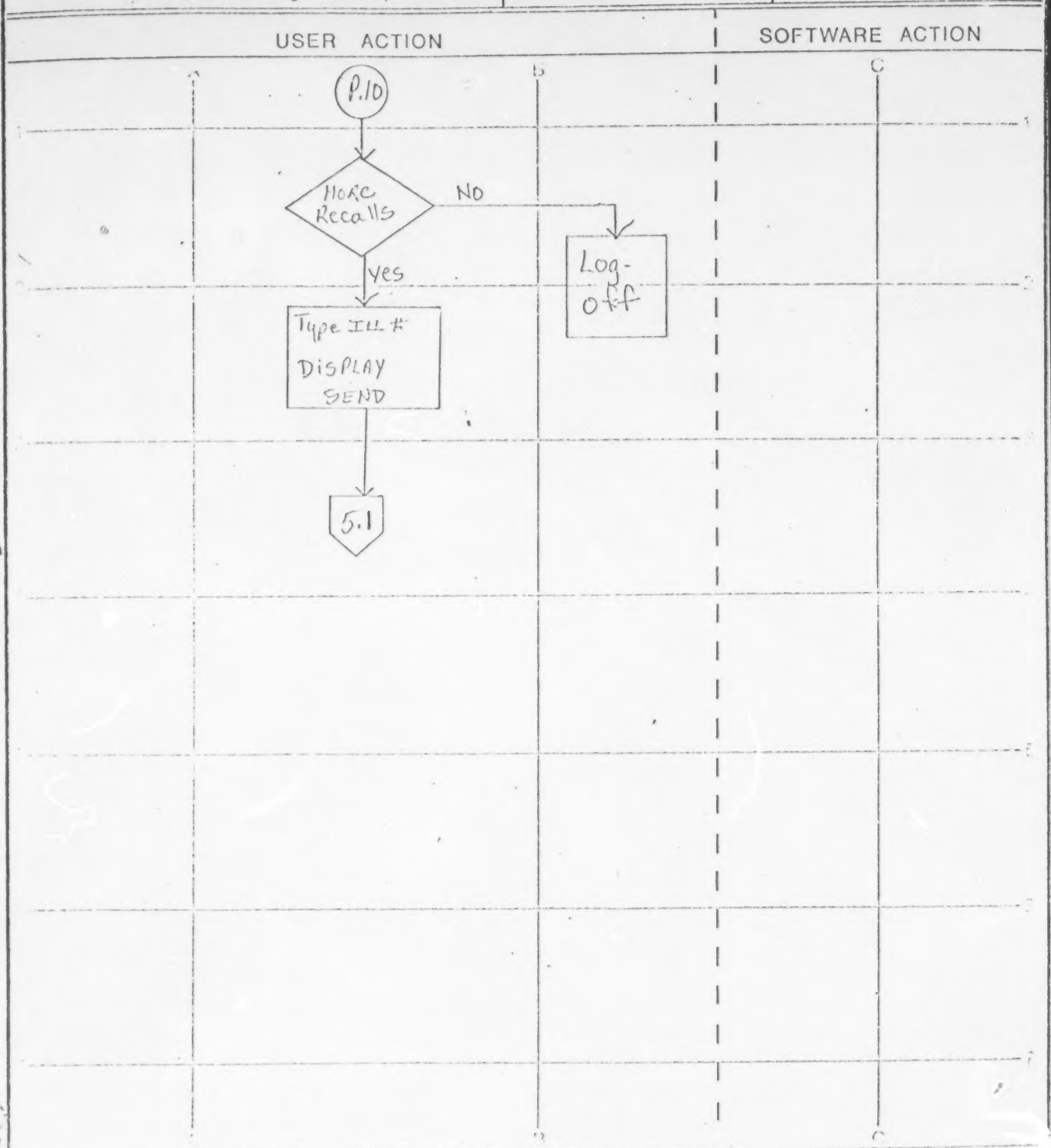
| Phyllis V. Bova | 76 | |

FORM 77022

USER WORKFLOW

| TO | PROJECT CODE | CLASS |
|---|---|---|
| RDD/ILL File | J000 | |
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT ... Transmitting ILL Requests | REF | PAGE 10 of 10 |

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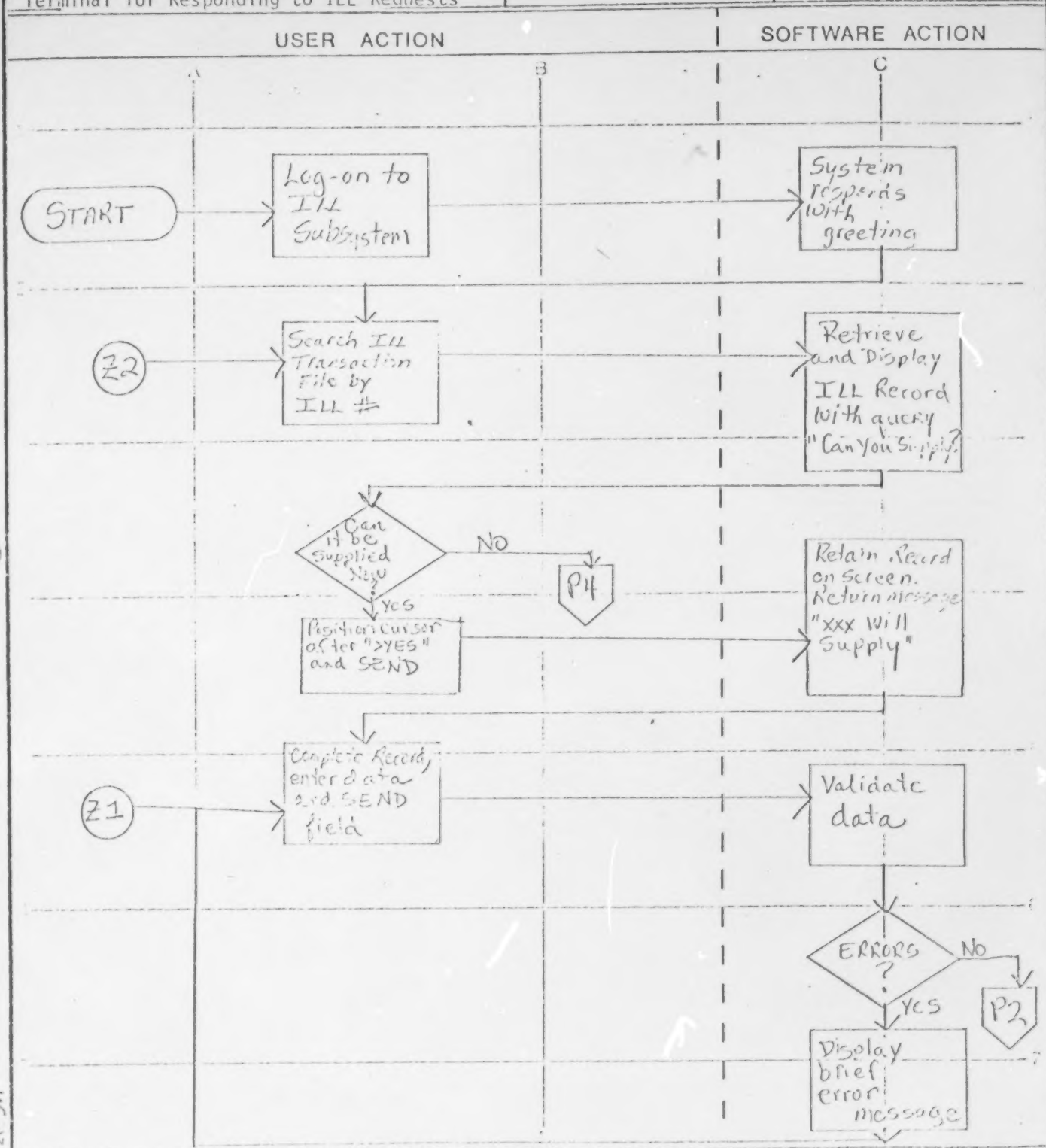
| Phyllis V. Bova | 77 | |

FORM 77024

# USER WORKFLOW

| | | |
|---|---|---|
| TO RDD/ILL File | PROJECT CODE JØØØ | CLASS |
| FROM Phyllis V. Bova | DATE 1977Ø72Ø | LEVEL |
| SUBJECT Lending Library Procedure at Terminal for Responding to ILL Requests | REF | PAGE 1 of 6 |

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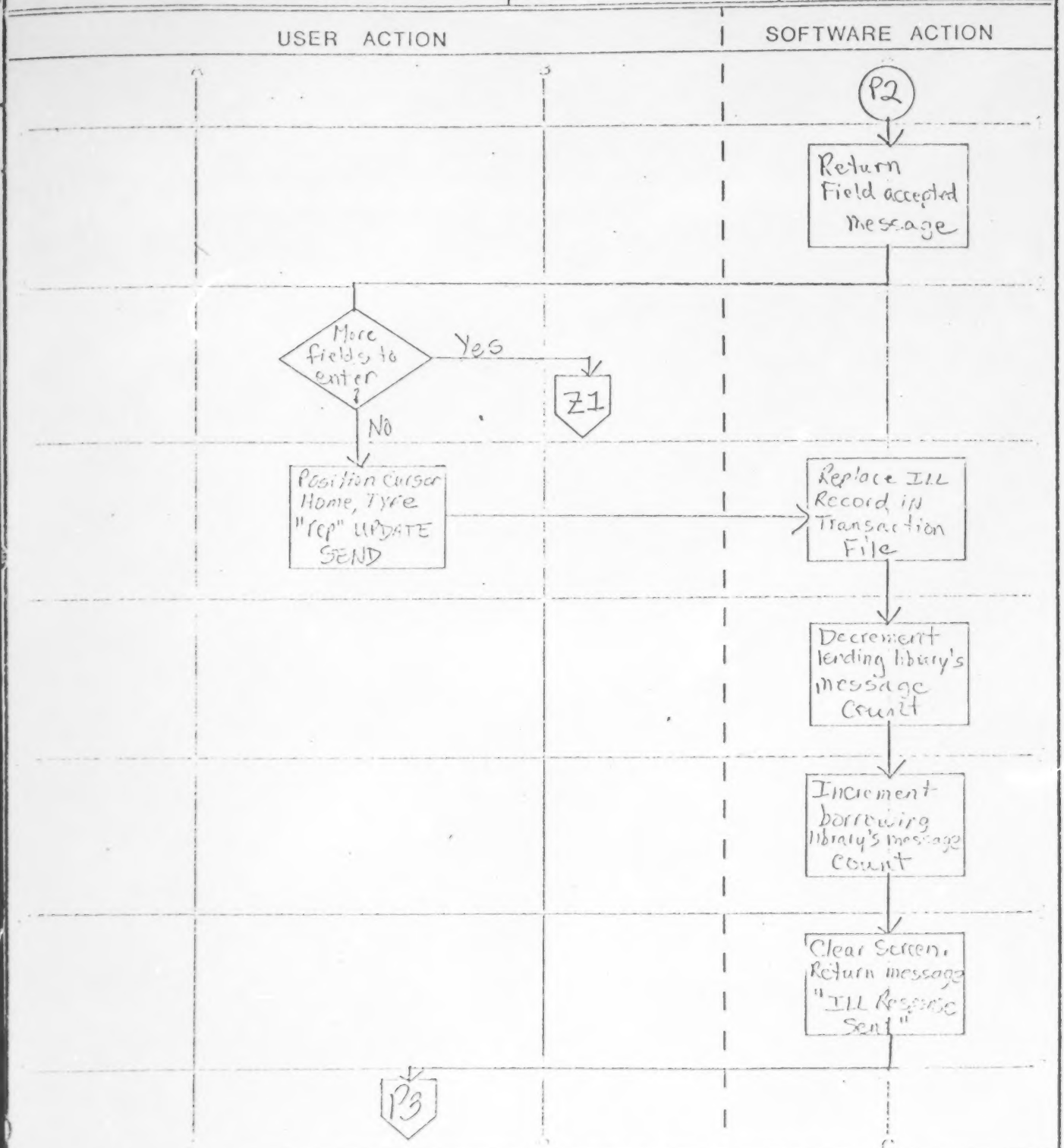
| Phyllis V. Bova | 78 | |

FORM 77022-01

| TO | RDD/ILL File | PROJECT CODE J000 | CLASS |
|---|---|---|---|
| FROM | Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT | ...Responding to ILL Requests | REF | PAGE 2 of 6 |

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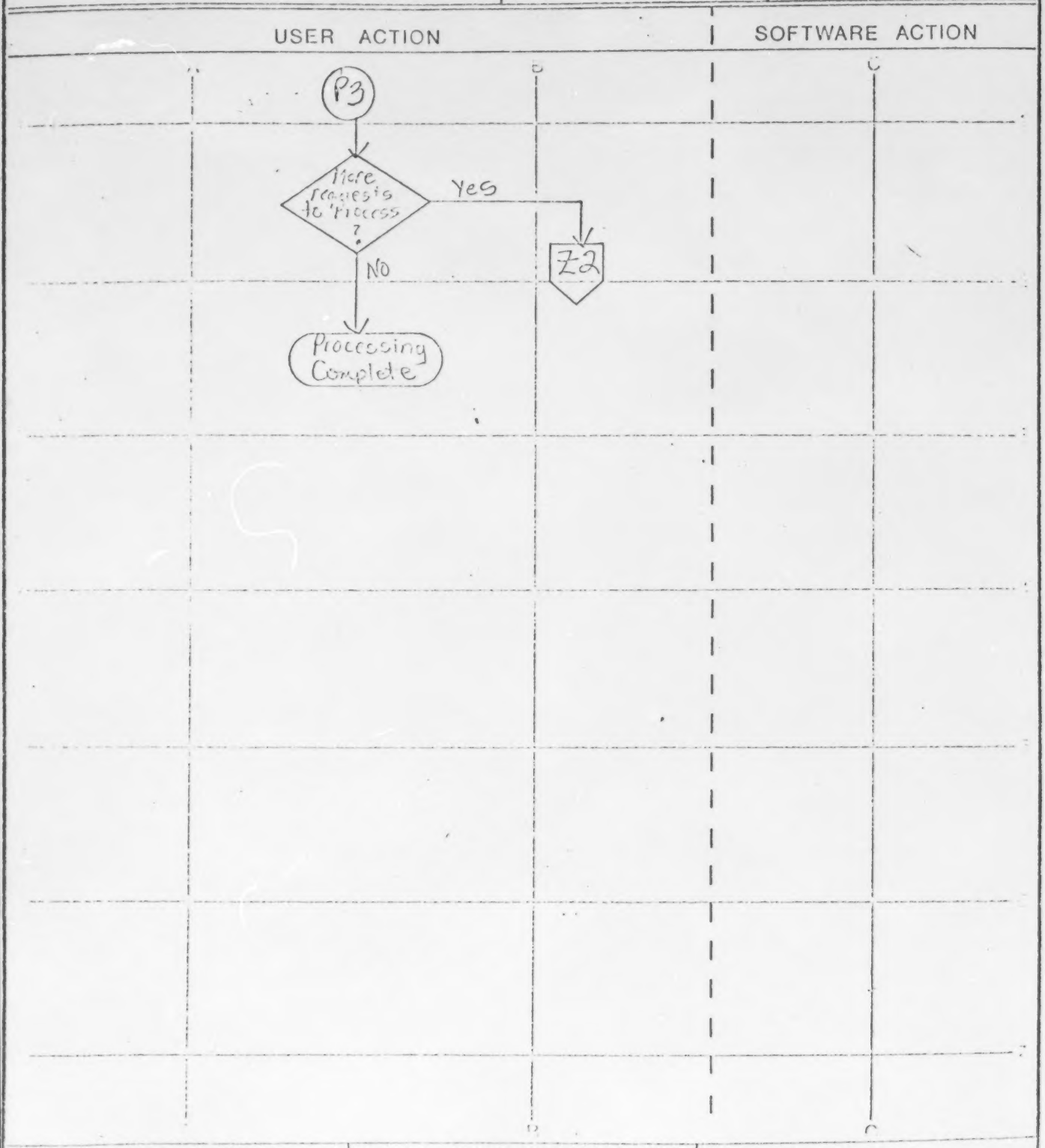
| Phyllis V. Bova | 79 | |

| TO RDD/ILL File | PROJECT CODE J000 | CLASS |
|---|---|---|
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT ... Responding to ILL Requests | REF | PAGE 3 of 6 |

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| Phyllis V. Bova | 80 | |

# USER WORKFLOW

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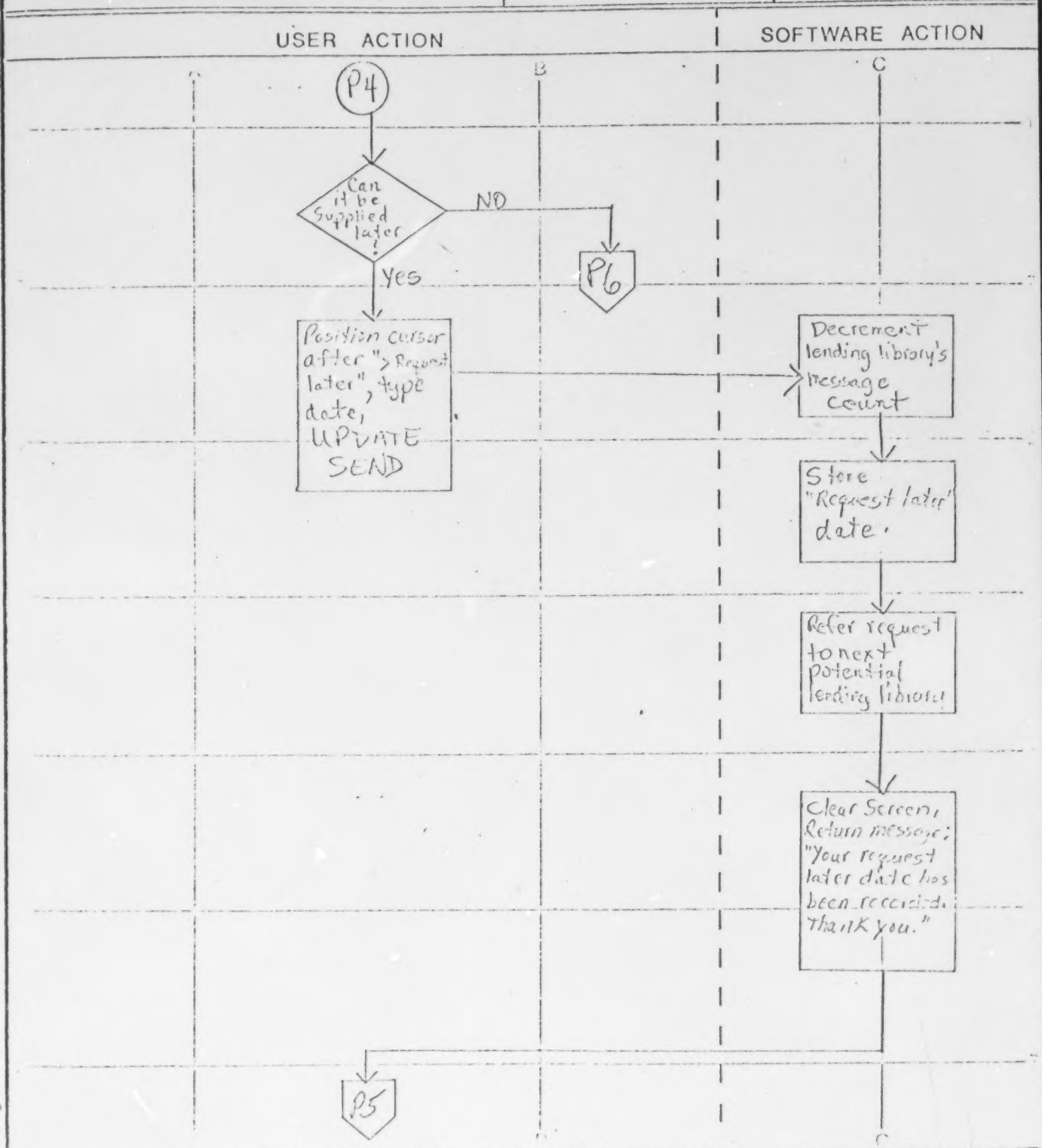
| TO RDD/ILL File | PROJECT CODE J000 | CLASS |
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT ... Responding to ILL Requests | REF | PAGE 4 of 6 |

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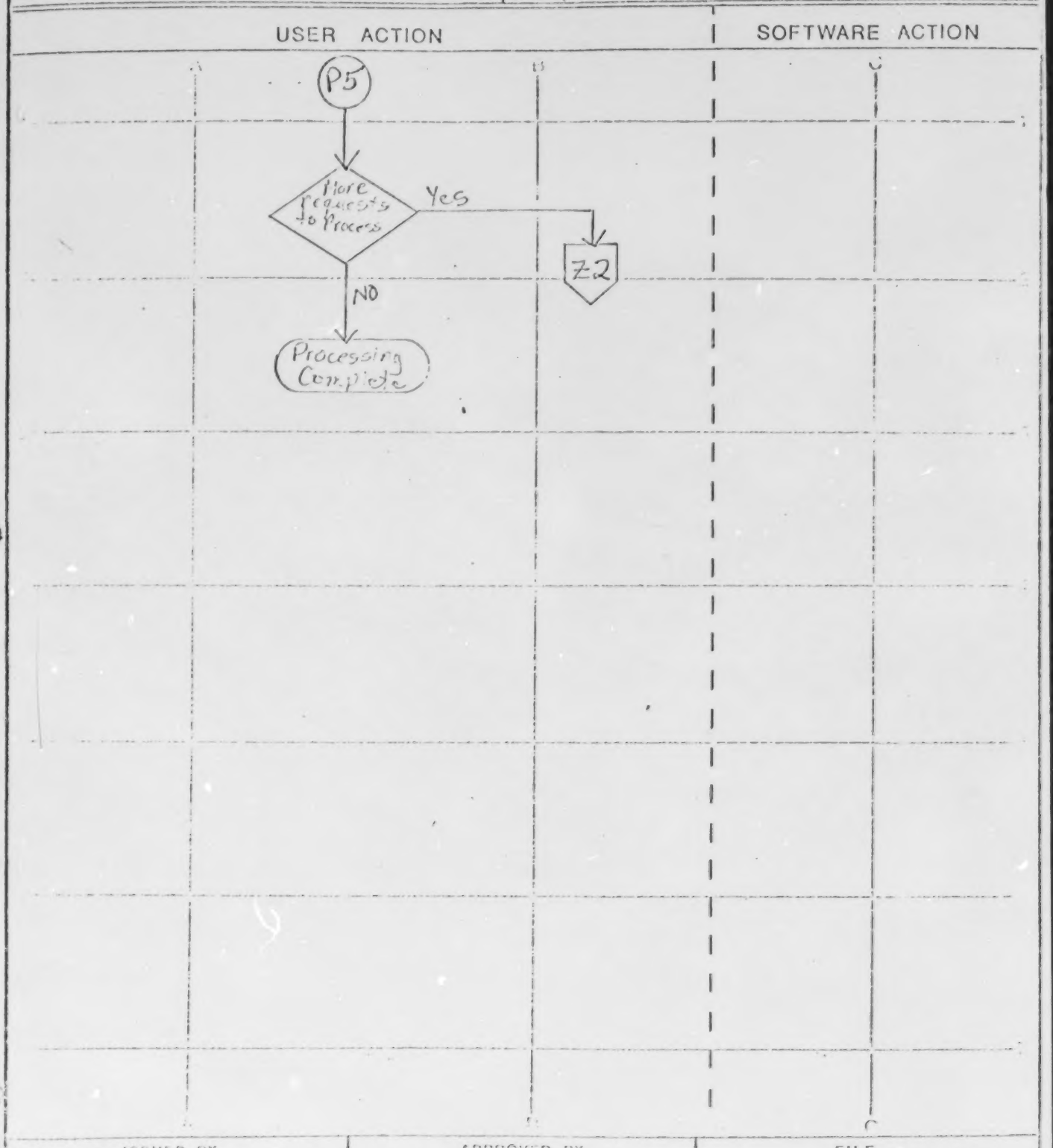
|---|---|---|
| Phyllis V. Bova | | |

FORM 770226

| TO RDD/ILL File | PROJECT CODE J000 | CLASS |
|---|---|---|
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT ... Responding to ILL Requests | REF | PAGE 5 of 6 |

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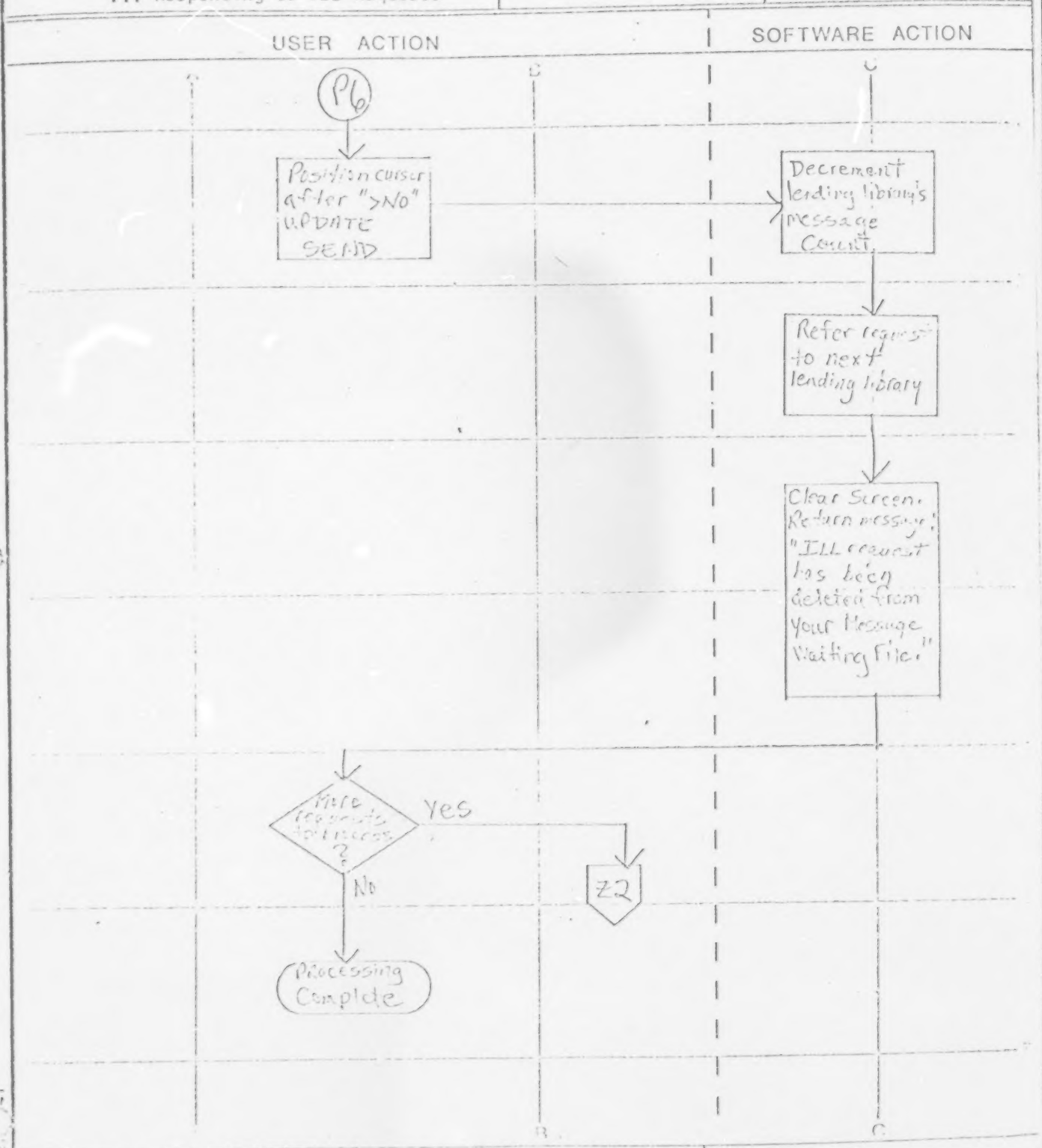
|---|---|---|
| Phyllis V. Bova | 82 | |

| TO | RDD/ILL File | PROJECT CODE J000 | CLASS |
|---|---|---|---|
| FROM | Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT | ... Responding to ILL Requests | REF | PAGE 6 of 6 |

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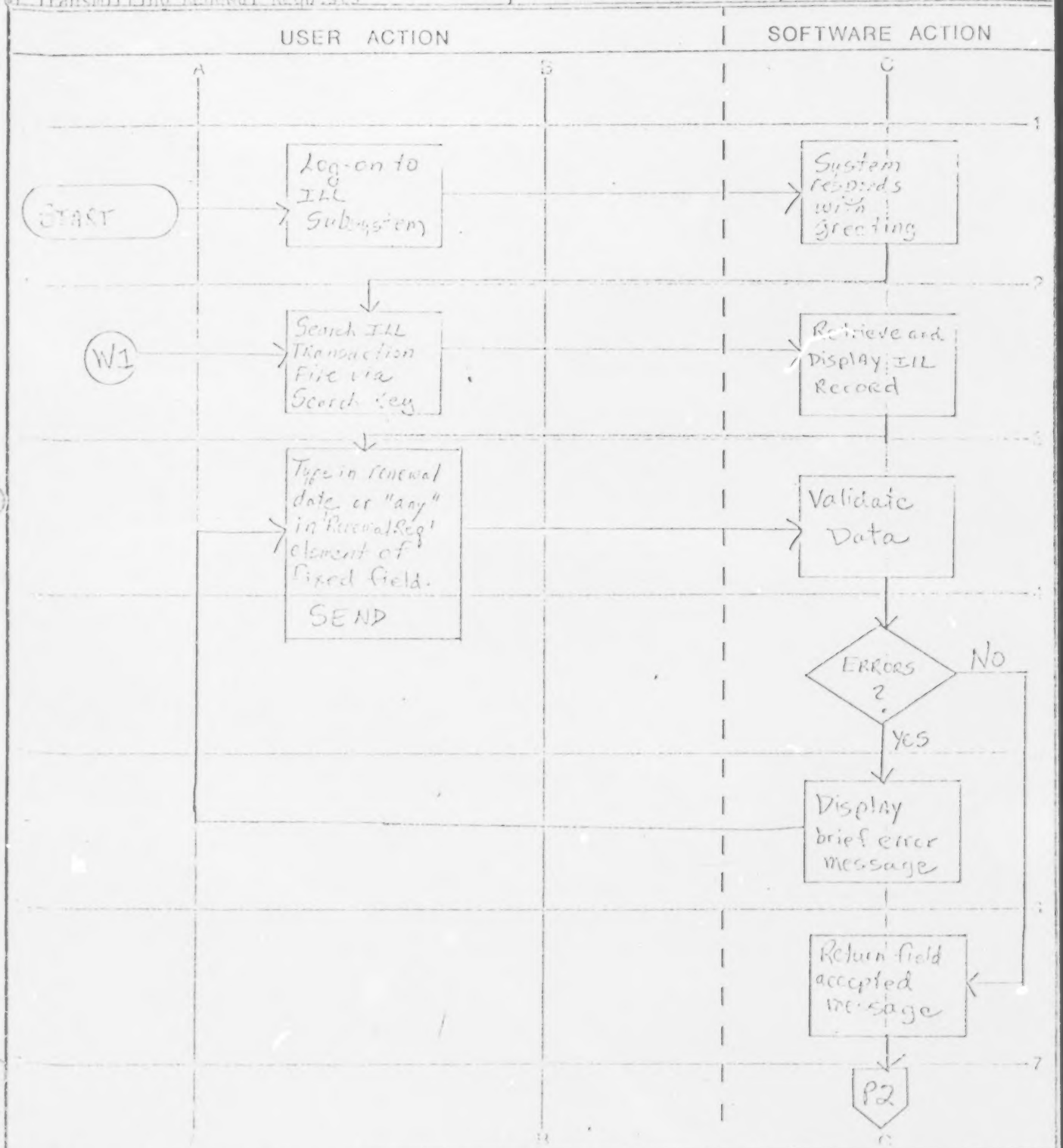
| Phyllis V. Bova | 83 | |

FORM 7702

USER WORKFLOW

| TO RDD/ILL File | PROJECT CODE JØØØ | CLASS |
|---|---|---|
| FROM Phyllis V. Bova | DATE 1977Ø72Ø | LEVEL |
| SUBJECT Borrowing Library Procedure at Terminal for Transmitting Renewal Requests | REF | PAGE 1 of 2 |

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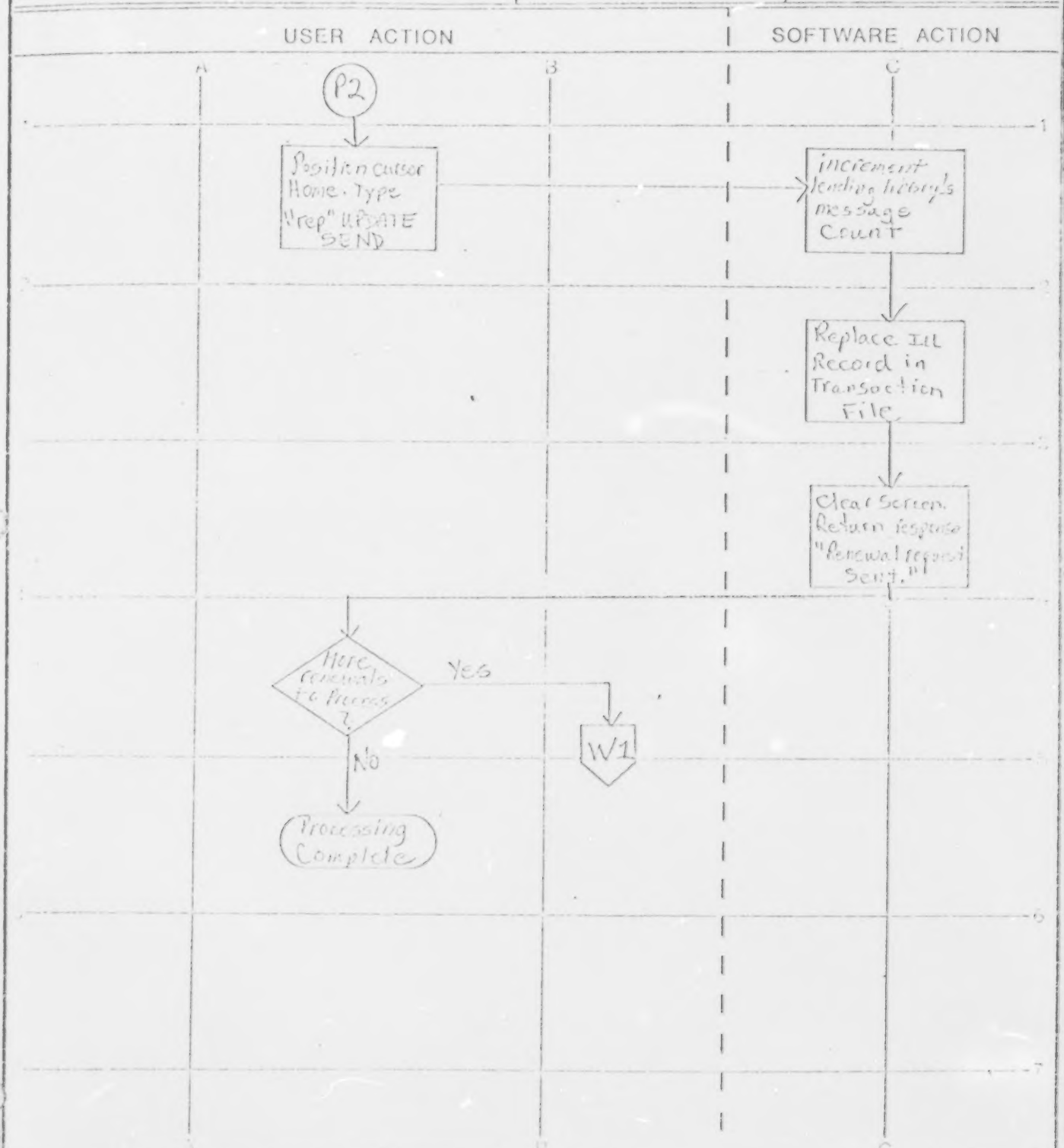
| Phyllis V. Bova | 84 | |

USER WORKFLOW

| TO RDD/ILL File | PROJECT CODE JØØØ | CLASS |
|---|---|---|
| FROM Phyllis V. Bova | DATE 1977Ø72Ø | LEVEL |
| SUBJECT ...Transmitting Renewal Requests | REF | PAGE 2 of 2 |

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| Phyllis V. Bova | 85 | |

# USER WORKFLOW

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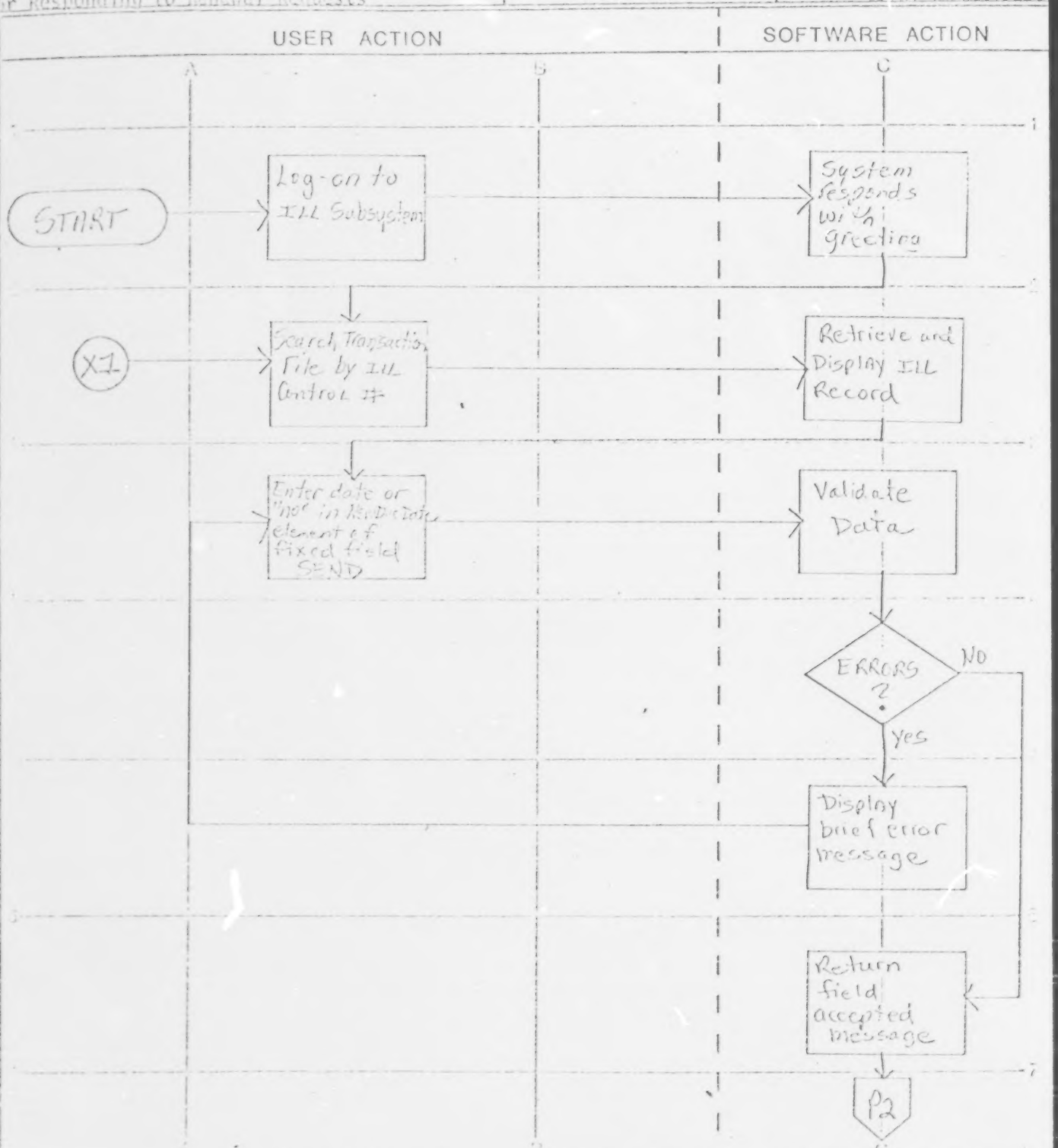
|---|---|---|
| TO RDD/ILL File | PROJECT CODE JØØØ | CLASS |
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT Lending Library Procedure at Terminal for Responding to Renewal Requests | REF | PAGE 1 of 2 |

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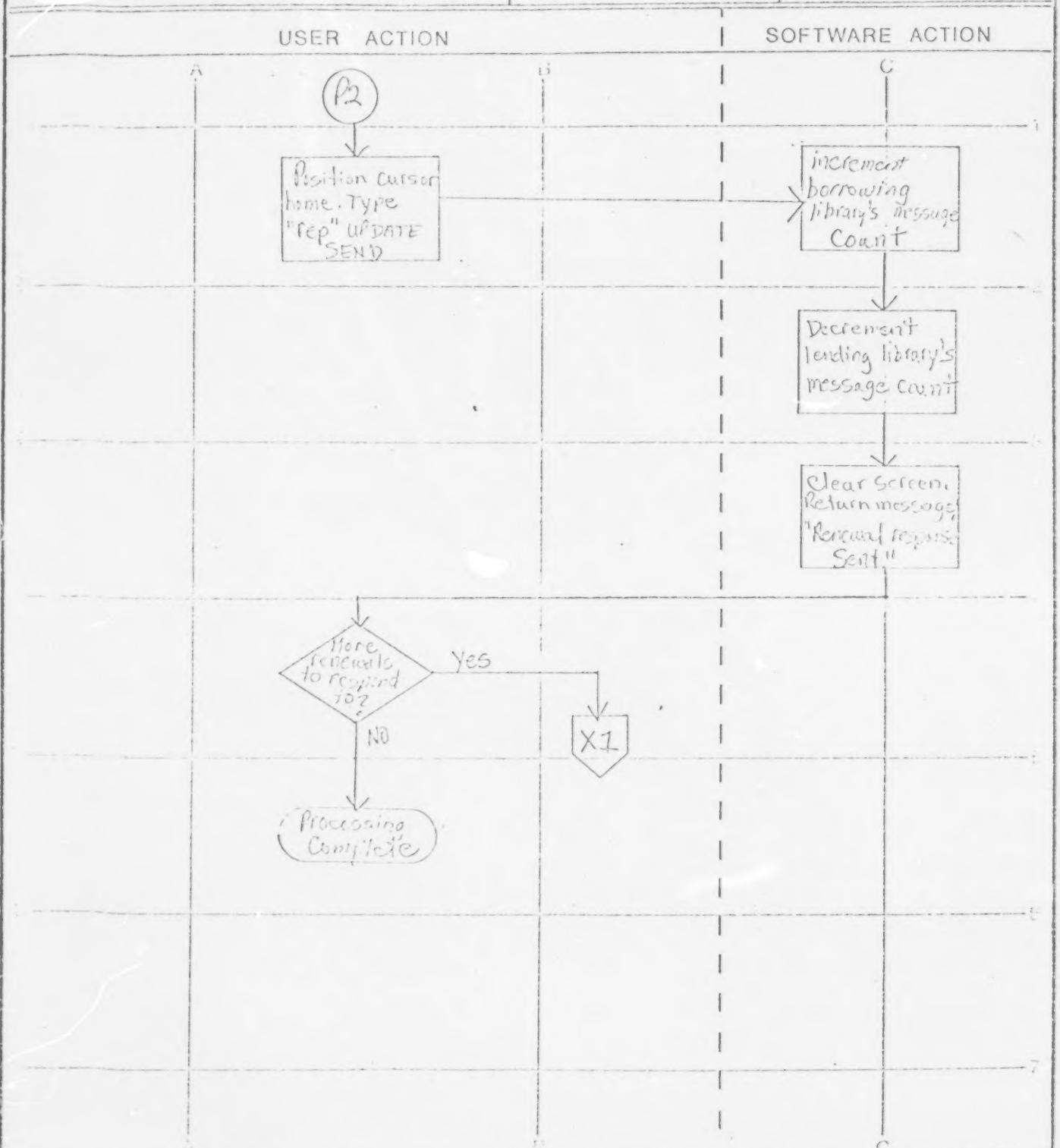
| Phyllis V. Bova | 86 | |

# USER WORKFLOW

| | | |
|---|---|---|
| TO RDD/ILL File | PROJECT CODE 3000 | CLASS |
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT ... Responding to Renewal Requests | REF | PAGE 2 of 2 |




| ISSUED BY | APPROVED BY | FILE |
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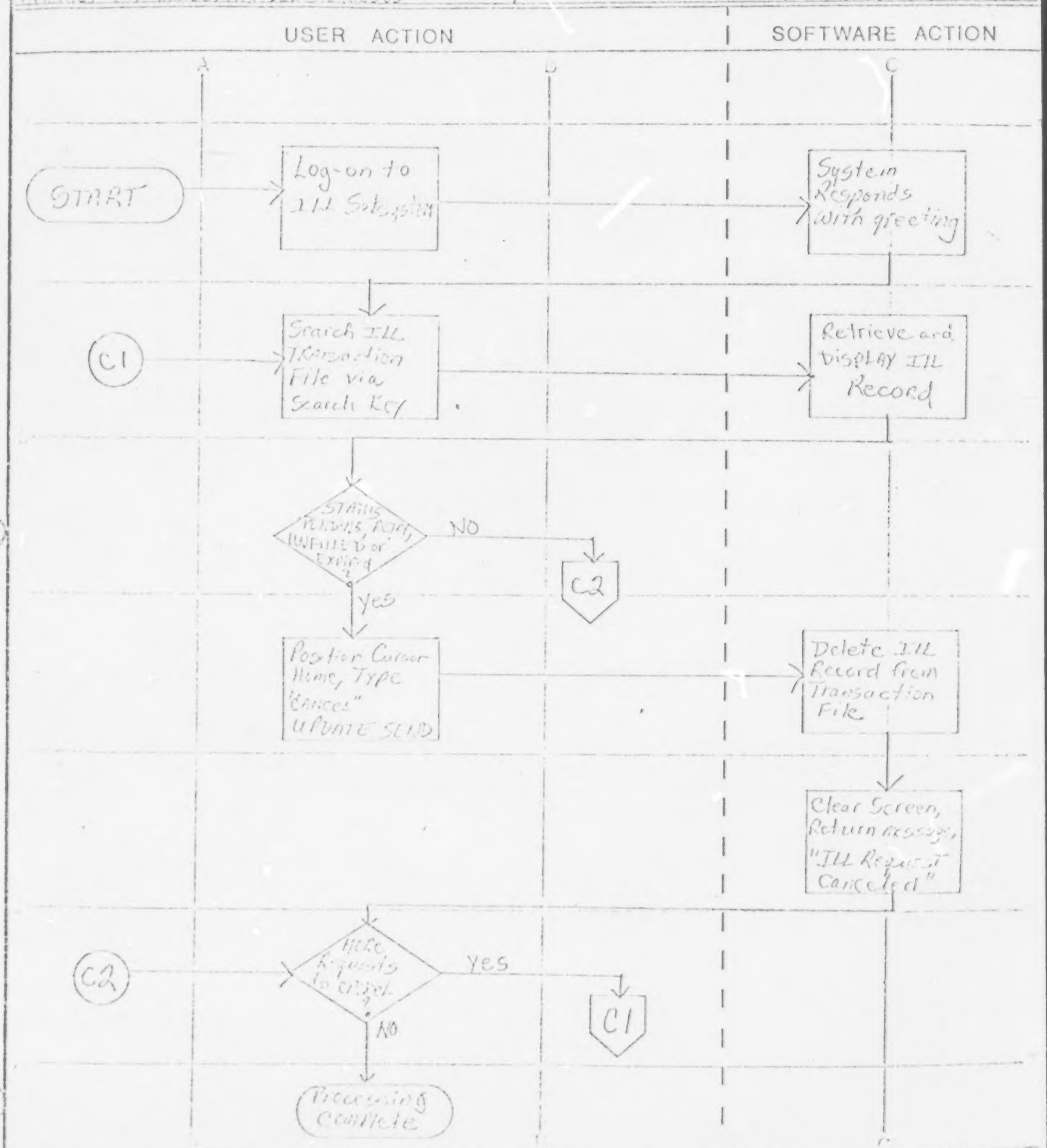
| Phyllis V. Bova | 87 | |

# USER WORKFLOW

| | | |
|---|---|---|
| TO RDD/ILL File | PROJECT CODE J000 | CLASS |
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT Borrowing Library Procedure at erminal for Canceling ILL Requests | REF | PAGE 1 of 1 |

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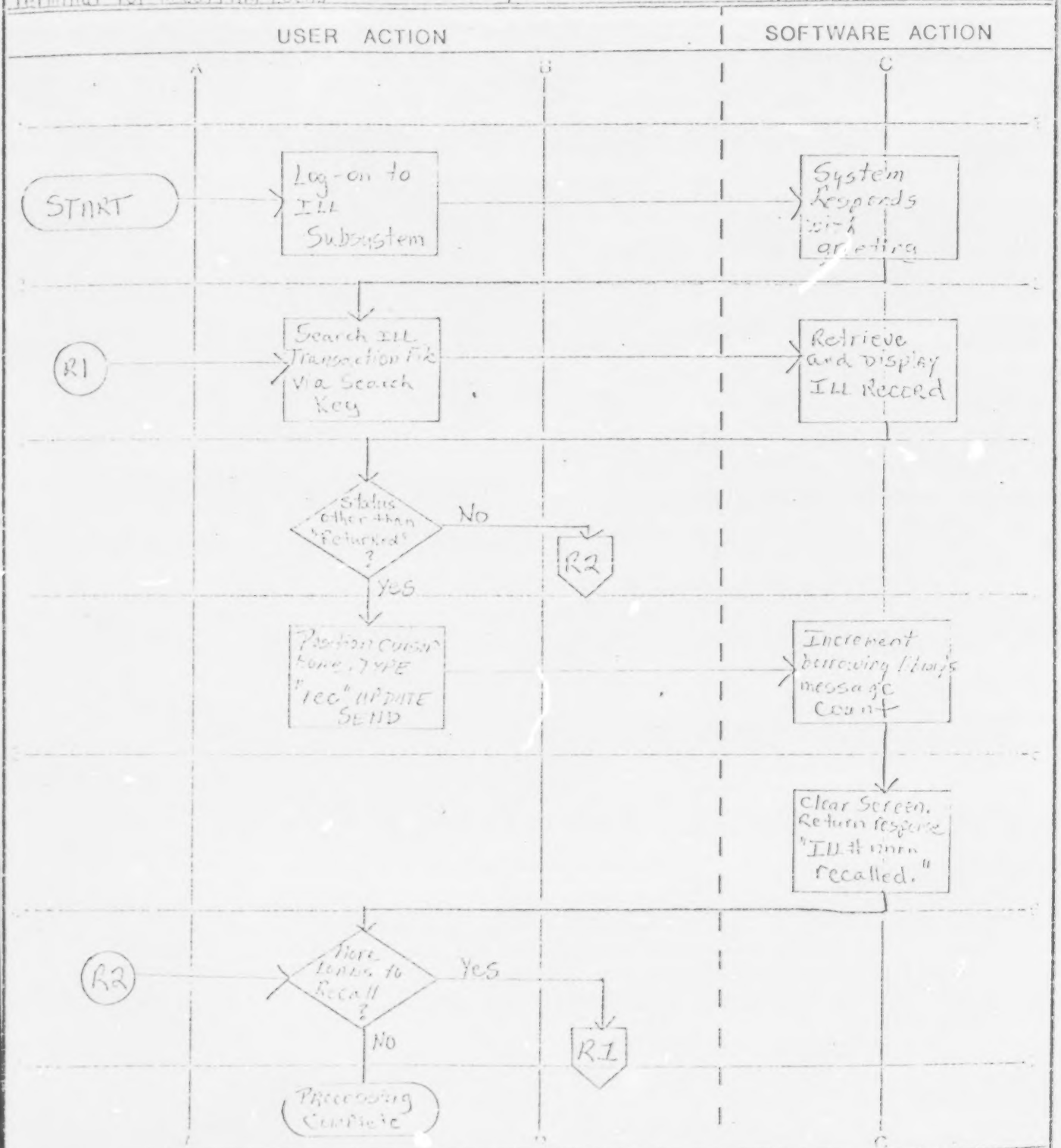
| Phyllis V. Bova | 88 | |

FORM 770226

# USER WORKFLOW

| | | |
|---|---|---|
| TO RDD/ILL File | PROJECT CODE J000 | CLASS |
| FROM Phyllis V. Bova | DATE 19770720 | LEVEL |
| SUBJECT Lending Library Procedure at Terminal for Recalling Loans | REF | PAGE 1 of 1 |

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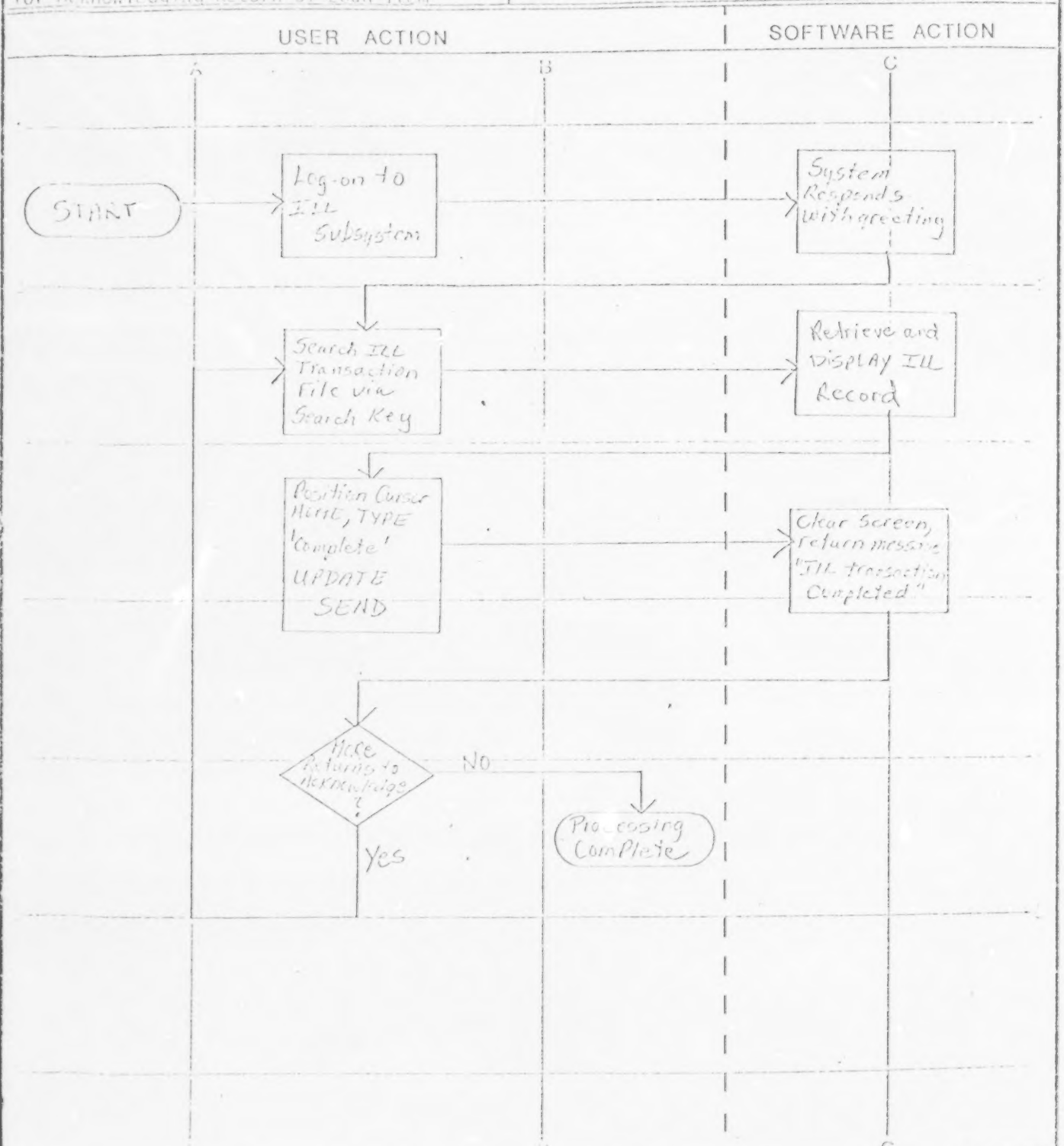
|---|---|---|
| Phyllis V. Bova | 89 | |

USER WORKFLOW

| | | |
|---|---|---|
| TO RDD/ILL File | PROJECT CODE JØØØ | CLASS |
| FROM Phyllis V. Bova | DATE 1977Ø72Ø | LEVEL |
| SUBJECT Lending Library Procedure at Termina for Acknowledging Return of Loan Item | REF | PAGE 1 of 1 |

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FUNCTIONAL SPECIFICATIONS

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## SUMMARY OF USER COMMANDS

| FUNCTION | COMMAND |
|---|---|
| Retrieve ILL on-line workform | wf DISPLAY SEND<br>or<br>* wf/syz,abc,def,ghi,jkl DISPLAY SEND |
| Cancel ILL request | 'cancel' UPDATE SEND |
| Initially transmit ILL request | PRODUCE/SEND |
| Replace ILL on-line transaction record after modifying | 'rep' UPDATE SEND |
| Acknowledge return of loaned item and completion of loan transaction | 'Complete' UPDATE SEND |
| Recall loan item from borrowing library | 'rec' UPDATE SEND |

* Three character symbols following the wf/ represent OCLC symbols of participating libraries.

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| SUBJECT System Error Messages | REF | PAGE 1 of 2 |

## SYSTEM ERROR MESSAGES

| Text of Message | User Action Resulting in Message | User Action After Receipt of Message |
|---|---|---|
| Illegal data | User entered undefined data in a field, e.g., alpha characters where only numerics are permitted. | Refer to User's Manual for correct data. Enter valid data and send altered field to computer. |
| Illegal line no. | User sent field with a line number greater than 19 or sent a field with a decimal line number. | No action necessary. Field will automatically drop from record when a reformat command is entered or when a PRODUCE or UPDATE is performed on the record. |
| Message not clear | User input a command or request that the system cannot interpret as a valid command or request. | Verify in User's Manual that correct punctuation and syntax is being used, and then re-enter command or request. |
| More than five lending libraries entered. | User entered more than five OCLC symbols in the LENDER element of the ILL record form command. | Delete additional symbols the LENDER element and send the altered field.<br><br>In the case of the work-form command, enter the command again followed by a maximum of five OCLC symbols. |
| XXX Illegal symbol | User input undefined OCLC symbol in one of the following positions:<br><br>Lender element of ILL record<br><br>Following the ILL Workform Command | Enter a defined OCLC symbol and send the field or workfor command again. |
| XXX Not ILL user | User entered a symbol of an OCLC participating library that is not an ILL participant | Enter a different OCLC symbol and send the field or workform commant again. |

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FUNCTIONAL SPECIFICATIONS

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| SUBJECT | REF | PAGE |
| System Error Messages | | |

## SYSTEM ERROR MESSAGES

| Text of Message | User Action Resulting in Message | User Action After Receipt of Message |
|---|---|---|
| Request impossible | User attempted to perform an illegal transaction, e.g., send a change to a system-controlled field. | Refer to section of User's Manual describing procedure being performed at the terminal. |

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| FROM Phyllis V. Bova | DATE 19770720 | REVIEWED BY |
| SUBJECT System Information Messages/ILL Subsystem | REF | PAGE |

## SYSTEM INFORMATION MESSAGES

| Text of Message | User Action Resulting in Message |
|---|---|
| Can you supply? >Yes >No >Future date: | This message displays on the first line above the ILL record each time the record is retrieved by a potential lending library until the library responds "yes", "no", or enters a "future date". |
| Field "n" added (where n = field number) | User input data in a field that previously contained no data and sent field to the computer. |
| Field 'n' deleted | User removed all data from a field and sent the blank field to the computer. |
| Field 'n' replaced | User entered or corrected data in a field that already contained data, and sent the altered field to the computer. |
| Fixed field updated | User entered or corrected data in the fixed field of the ILL record and sent the field to the computer. |
| ILL# nnnn recalled | Lending library has retrieved an ILL record and has entered the "recall" command. |
| ILL# nnnn sent (where nnnn = ILL control number) | Borrowing library completed the ILL workform and transmitted the request by depressing PRODUCE and SEND keys. |
| ILL# nnnn updated | Lending library completed the appropriate fields in the ILL record and transmitted record back to borrowing library by depressing UPDATE and SEND keys. |
| ILL# nnnnnn has been deleted from your Message Waiting File | Potential lending library responded "no" to the question "Can you supply?" |
| ILL request canceled | Borrowing library retrieved ILL request and canceled the loan by entering "cancel" and depressing UPDATE and SEND keys. |

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## SYSTEM INFORMATION MESSAGES

| Test of Message | User Action Resulting in Message |
|---|---|
| ILL transaction completed | Lending library retrieved ILL record and acknowledged return of loan item by entering "complete" and depressing UPDATE and SEND keys. |
| Renewal request sent | Borrowing library entered data in "Renewal Req" element of ILL record, sent the field to the computer and then depressed UPDATE and SEND keys. |
| Renewal response sent | Lending library entered data in the "NewDueDate" element of the ILL record, sent the field to the computer, and then depressed UPDATE and SEND keys. |
| (Search Key) is not in the (name of index) index. Please try a different search key | Operator has entered a key to search the on-line transaction file, and the key yields no matches. |
| XXX will supply | Potential lending library responded "yes" to the question "Can you supply?" |
| Your future date has been recorded. Thank you. | Potential lending library entered a "future date" in response to the question "Can you supply?" |

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